

Overview

TOTAL TRAVEL ⁽¹⁾				
Estimate	% change		Market share	
99.2 million visitors	6.1%	↑	31.4%	-0.2% pt
Aus	6.7%	↑		
200.6 million nights	3.1%	↑	31.4%	-0.2% pts
Aus	3.9%	↑		
\$37.8 billion	9.3%	↑	31.0%	0.3% pts
Aus	8.6%	↑		

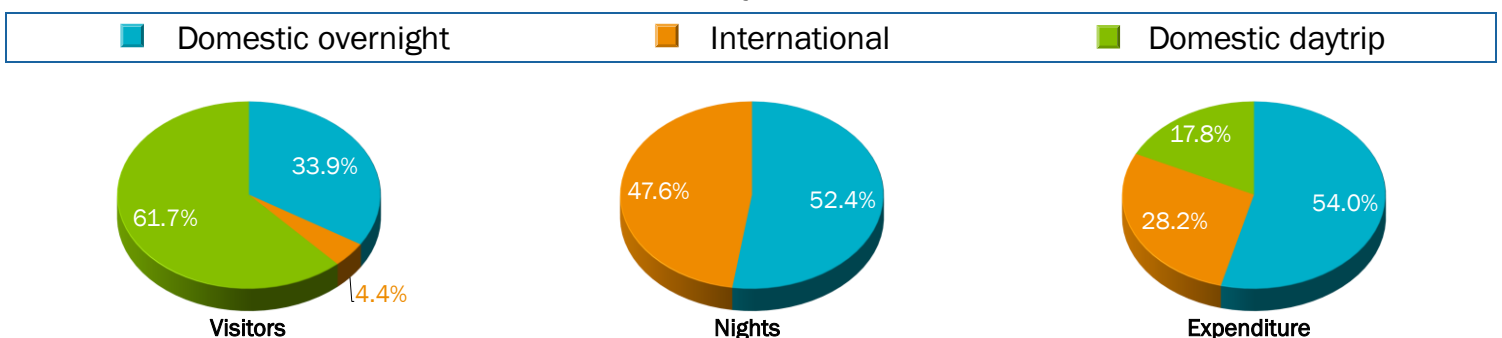
Domestic overnight travel ⁽²⁾				
Estimate	% change		Market share	
33.6 million visitors	8.4% *	↑	32.7%	0.4% pts
Aus	7.0% *	↑		
105.1 million nights	5.5% *	↑	28.5%	-0.2% pt
Aus	6.0% *	↑		
\$20.4 billion	13.0% *	↑	29.1%	0.7% pts
Aus	10.3% *	↑		

International overnight travel ⁽³⁾				
Estimate	% change		Market share	
4.3 million visitors	3.4% *	↑	51.3%	-1.1% pts
Aus	5.7% *	↑		
95.5 million nights	0.6%	→	35.3%	-0.2% pts
Aus	1.1%	→		
\$10.6 billion	2.1%	↑	35.7%	-1.1% pts
Aus	5.2% *	↑		

Domestic daytrip travel ⁽²⁾				
Estimate	% change		Market share	
61.2 million visitors	5.1% *	↑	29.9%	-0.4% pts
Aus	6.6% *	↑		
\$6.7 billion	10.6% *	↑	30.6%	0.8% pts
Aus	7.7% *	↑		

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

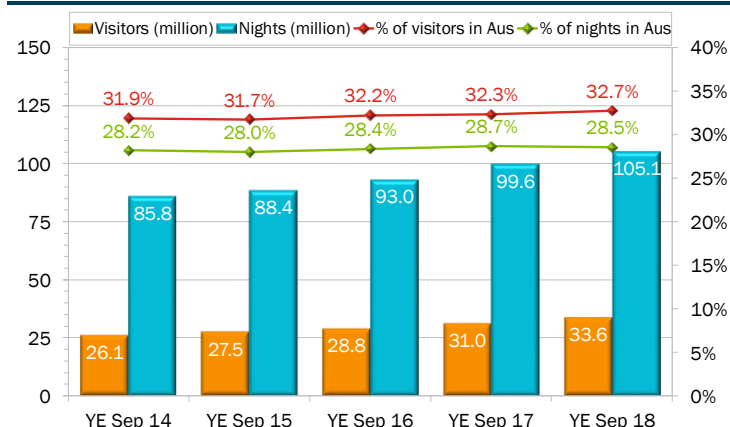
(1) Estimated using data from National Visitor Survey (NVS), International Visitor Survey (IVS) & Tourism Research Australia's (TRA) expenditure allocation method applied to NVS and IVS data, YE Sep 18.

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

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

Domestic Overnight Travel⁴

Visitors and nights

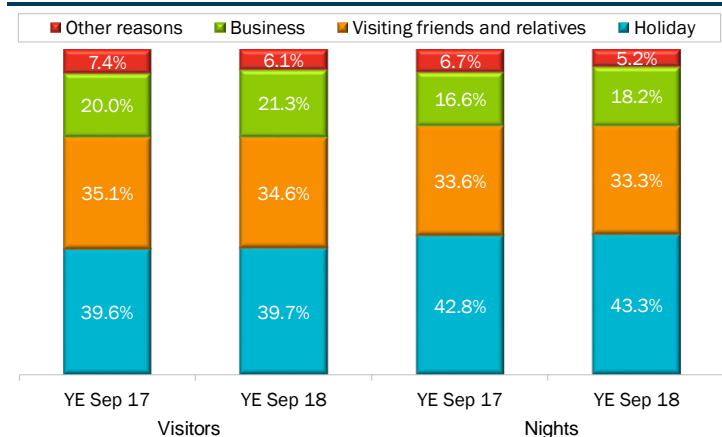


NSW received over 33.6 million domestic overnight visitors - up by 8.4%* on YE Sep 17. Visitors spent over 105.1 million nights in the State - up by 5.5%* on YE Sep 17.

Market share

NSW received 32.7% of visitors and 28.5% of nights in Australia. Compared to YE Sep 17, the share of visitors was up by 0.4% pts and the share of nights was down by 0.2% pts.

Purpose of visit to NSW



'Holiday' (39.7%) was the largest purpose of visit for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (34.6%) and 'business' (21.3%). Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 8.6%* and 'VFR' increased by 6.9%* while 'business' grew by 15.3%*.

'Holiday' (43.3%) was the largest purpose in terms of nights in the State, followed by 'VFR' (33.3%) and 'business' (18.2%). Compared to YE Sep 17, nights spent for 'holiday' grew by 6.7%* and 'VFR' increased by 4.4% while 'business' grew by 15.7%*.

Accommodation in NSW

'Friends or relatives property' (39.0%) 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 Sep 17, 'friends or relatives property' increased by 1.2% pts, while 'caravan park or commercial camping ground' decreased by 0.7% pts.

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	12,593	37.4%	35,355	6,126	173	2.8
Sydney	9,568	28.4%	27,143	5,825	215	2.8
Total intrastate	22,161	65.9%	62,498	11,951	191	2.8
Queensland	4,213	12.5%	15,824	2,942	186	3.8
Victoria	4,048	12.0%	14,369	3,134	218	3.5
ACT	1,799	5.3%	5,129	833	162	2.9
Other interstate	1,413	4.2%	7,291	1,560	214	5.2
Total interstate	11,472	34.1%	42,612	8,469	199	3.7
Total NSW	33,633		105,110	20,421	194	3.1

Regional NSW (12.6 million or 37.4%) was the largest source of visitors to the State, followed by Sydney (9.6 million or 28.4%) and Queensland (4.2 million or 12.5%). Compared to YE Sep 17, the regional NSW source market grew by 5.3%* and Sydney increased by 8.3%* while Queensland grew by 12.6%*.

Regional NSW (35.4 million or 33.6%) was the largest source market in terms of nights in the State, followed by Sydney (27.1 million or 25.8%) and Queensland (15.8 million or 15.1%). Compared to YE Sep 17, nights spent by visitors from regional NSW grew by 4.5% and nights from Sydney increased by 6.8% while nights by Queenslanders grew by 4.7%.

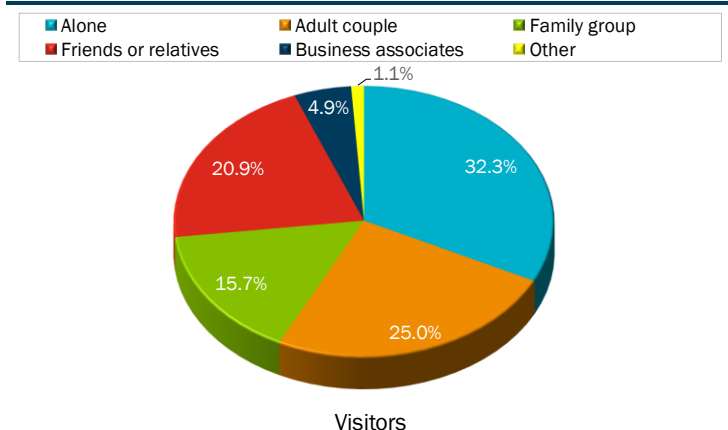
Transport in NSW

'Private vehicle or company car' (75.1%) was the most popular form of transport used by visitors to NSW, followed by 'aircraft' (18.7%) and 'railway' (4.3%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (65.5%) was the most popular activity undertaken by visitors to the State. 'Visit friends and relatives' (44.7%) was the 2nd most popular, followed by 'sightseeing or looking around' (25.5%).

Travel party



'Alone' (32.3%) was the most common travel party amongst visitors to NSW. 'Adult couple' (25.0%) was the 2nd most common, followed by 'friends or relatives' (20.9%).

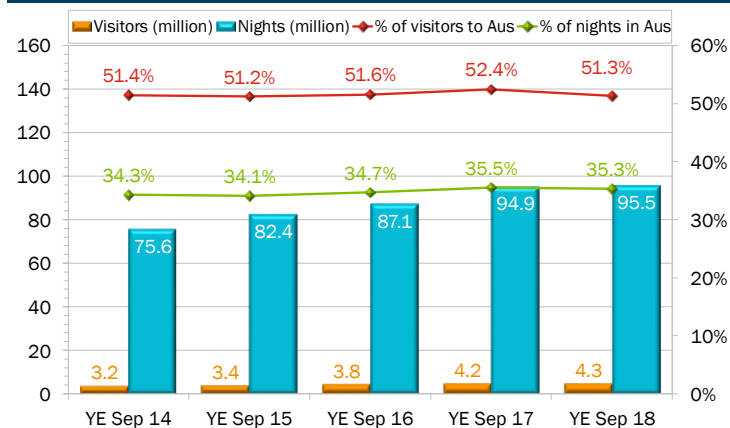
Expenditure (incl airfares and transport costs)⁶

Domestic overnight visitors spent \$20.4 billion in NSW - up by 13.0%* on YE Sep 17. On average, visitors spent \$194 per night in NSW - up by 7.1% on YE Sep 17.

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

International Overnight Travel⁵ - preliminary

Visitors and nights



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.

Market share

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.

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	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
	Other markets	1,312	30.3%	37,869	3,146	83	28.9
	Total NSW	4,332		95,539	10,648	111	22.1

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%). 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.

Expenditure (incl 30% prepaid package expenditure)⁷

International overnight visitors spent \$10.6 billion in NSW - up by 2.1% on YE Sep 17. On average, visitors spent \$111 per night in NSW - up by 1.5% on YE Sep 17.

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

Preliminary IVS results

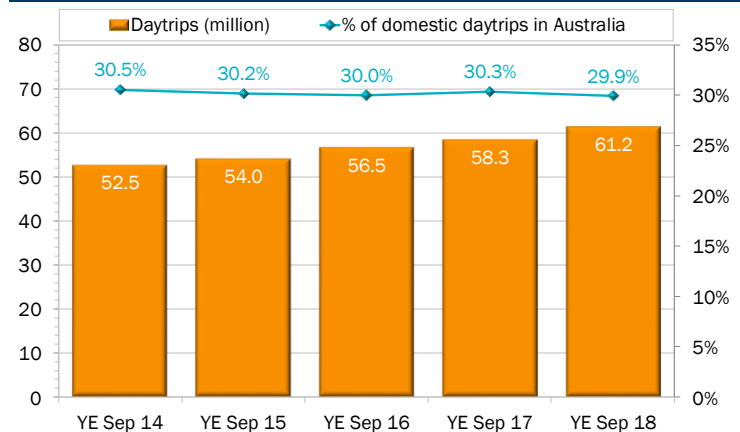
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Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Sep 18 are preliminary.

* The percentage change is statistically significant.

Domestic Daytrip Travel⁴

Daytrips



NSW received over 61.2 million domestic daytrip visitors - up by 5.1%* on YE Sep 17.

Market share

NSW received 29.9% of daytrips in Australia. Compared to YE Sep 17, the share was down by 0.4% pts.

Main purpose of trip

'Holiday' (48.9%) was the largest purpose of trip for visitors to the State, followed by 'visiting friends and relatives (VFR)' (28.7%) and 'business' (10.7%). Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 6.9%* and 'VFR' increased by 4.6% while 'business' grew by 18.5%*.

Age groups

'15 to 29 years' (21.4%) was the largest age group of visitors to the State, followed by '60 to 69 years' (17.3%) and '50 to 59 years' (16.7%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (50.9%) was the most popular activity undertaken by visitors to NSW, followed by 'visit friends and relatives' (33.4%).

Expenditure⁶

Domestic daytrip visitors spent \$6.7 billion in NSW - up by 10.6%* on YE Sep 17. On average, they spent \$110 per trip to the State - up by 5.3% on YE Sep 17.

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

Forecast⁸

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 for detailed profiles on travel to each of NSW's regions and information on international and domestic travel to the State.