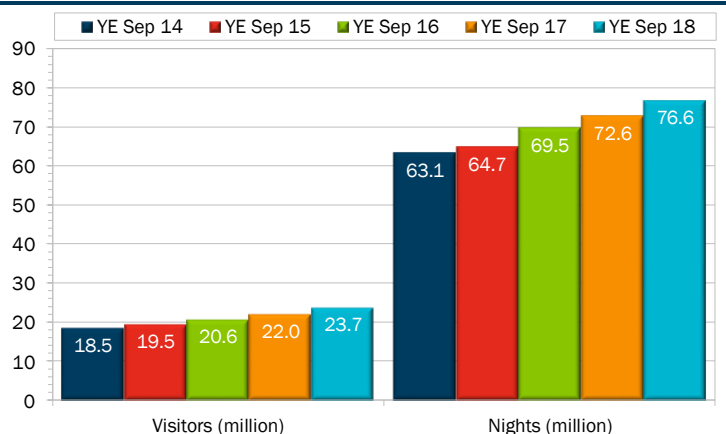


Domestic Overnight Travel¹

Visitors and nights



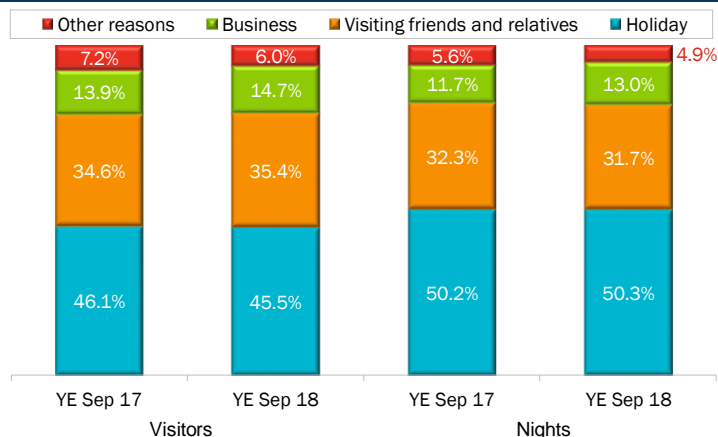
Regional NSW received nearly 23.7 million domestic overnight visitors - up by 7.7%* on YE Sep 17. Visitors spent nearly 76.6 million nights in regional NSW - up by 5.5%* on YE Sep 17.

Note: The number of domestic overnight trips to New South Wales increased by 8.4 percent* on last year and by 29.0 percent* compared to four years ago.

Market share

Regional NSW received 70.3% of visitors and 72.8% of nights in NSW. Compared to YE Sep 17, the share of visitors was down by 0.5 pts and the share of nights was down by 0.1% pt.

Purpose of visit to regional NSW



'Holiday' (45.5%) was the largest purpose of visit for visitors to regional NSW, followed by 'visiting friends and relatives (VFR)' (35.4%) and 'business' (14.7%). Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 6.4%* and 'VFR' increased by 10.3%* while 'business' grew by 13.5%*.

'Holiday' (50.3%) was the largest purpose in terms of nights in regional NSW, followed by 'VFR' (31.7%) and 'business' (13.0%). Compared to YE Sep 17, nights spent for 'holiday' grew by 5.9% and 'VFR' increased by 3.7% while 'business' grew by 17.8%*.

Accommodation in regional NSW

'Friends or relatives property' (36.6%) was the most popular accommodation used for nights in regional NSW. 'Caravan park or commercial camping ground' (13.3%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (13.2%).

Origin

Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in Reg NSW (\$ million)	Average spend per night in Reg NSW	Average length of stay in Reg NSW
Regional NSW	8,726	36.9%	26,218	4,245	162	3.0
Sydney	8,736	36.9%	25,574	4,059	159	2.9
Total intrastate	17,462	73.8%	51,792	8,304	160	3.0
Queensland	2,680	11.3%	9,988	1,535	154	3.7
Victoria	1,833	7.7%	7,898	1,173	149	4.3
ACT	1,140	4.8%	3,567	468	131	3.1
Other interstate	542	2.3%	3,304	503	152	6.1
Total interstate	6,195	26.2%	24,758	3,679	149	4.0
Total regional NSW	23,657		76,550	11,983	157	3.2

Sydney (8.7 million or 36.9%) was the largest source of visitors to regional NSW, followed by regional NSW (8.7 million or 36.9%) and Queensland (2.7 million or 11.3%). Compared to YE Sep 17, the Sydney source market grew by 9.8%* and regional NSW increased by 6.4%* while Queensland grew by 10.4%*.

Regional NSW (26.2 million or 34.2%) was the largest source market in terms of nights in regional NSW, followed by Sydney (25.6 million or 33.4%) and Queensland (10.0 million or 13.0%). Compared to YE Sep 17, nights spent by visitors from regional NSW grew by 4.9% and nights from Sydney increased by 9.3%* while Queensland nights grew by 5.7%.

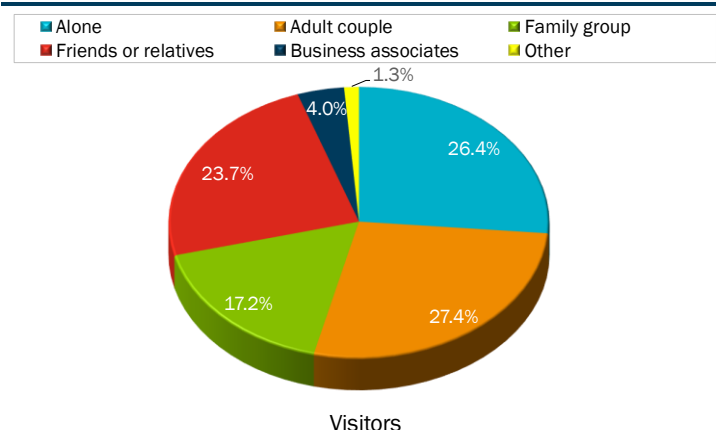
Top activities in regional NSW

'Eat out, dine at a restaurant or cafe' (62.5%) was the most popular activity undertaken by visitors to regional NSW, followed by 'visit friends and relatives' (43.9%) and 'go to the beach' (27.2%).

Age groups

'15 to 29 years' (22.5%) was the largest age group of visitors to regional NSW, followed by '50 to 59 years' (18.1%) and '30 to 39 years' (17.1%).

Travel party



'Adult couple' (27.4%) was the most common travel party amongst visitors to regional NSW, followed by 'alone' (26.4%) and 'friends or relatives' (23.7%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent nearly \$12.0 billion in regional NSW - up by 8.2%* on YE Sep 17. On average, they spent \$157 per night - up by 2.5% on YE Sep 17.

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

Travel to Regional NSW

Year ended September 2018

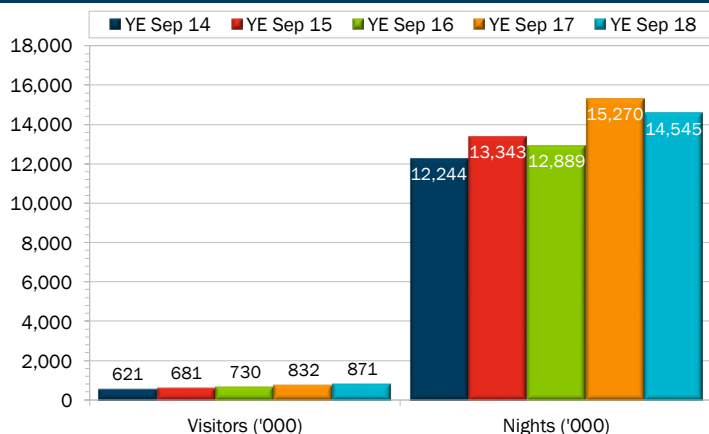
For the period of October 2017 to September 2018

Sources: (1) NVS YE & (2) IVS, YE Sep 18, TRA - unless otherwise specified.

Preliminary	YE Sep 17	YE Sep 18	YE on YE growth	Share of regional NSW		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	60.7	63.8	5.2%	1.4%	37.1%	61.6%
Total nights (million)	87.8	91.1	3.7%	16.0%	84.0%	0.0%
Total spend (billion)	\$16.0	\$17.4	8.6%	5.8%	69.0%	25.2%

International Overnight Travel² - preliminary

Visitors and nights



Regional NSW received 870,800 international overnight visitors - up by 4.6%* on YE Sep 17. Visitors spent over 14.5 million nights in regional NSW - down by 4.7% on YE Sep 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 3.4 percent* on last year and by 34.4 percent* compared to four years ago.

Market share

Regional NSW received 20.1% of visitors and 15.2% of nights in NSW. Compared to YE Sep 17, the share of visitors was up by 0.2% pts and the share of nights was down by 0.9% pts.

Origin to regional NSW

Rank	Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in Reg NSW (\$ million)	Average spend per night Reg NSW	Average length of stay in Reg NSW
1	United Kingdom	140	16.1%	1,649	108	65	11.8
2	New Zealand	107	12.3%	989	86	87	9.2
3	USA	90	10.3%	897	79	88	10.0
4	Germany	59	6.8%	829	37	44	14.0
5	Mainland China	56	6.4%	1,310	157	120	23.3
6	Canada	33	3.8%	495	33	67	14.9
7	France	26	3.0%	468	18	39	18.0
8	South Korea	26	3.0%	450	24	53	17.4
9	India	21	2.4%	593	36	60	28.4
10	Taiwan	19	2.2%	625	33	54	32.6
	Other markets	293	33.7%	6,240	397	64	21.3
	Total Reg NSW	871		14,545	1,007	69	16.7

Accommodation in regional NSW

'Friends or relatives property' (36.0%) was the most popular form of accommodation for nights in regional NSW, followed by 'rented house, apartment, flat or unit' (27.6%) and 'backpacker or hostel' (5.8%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent over \$1.0 billion in regional NSW - down by 6.7% on YE Sep 17. On average, they spent \$69 per night - down by 2.1% on YE Sep 17.

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

Preliminary IVS 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.

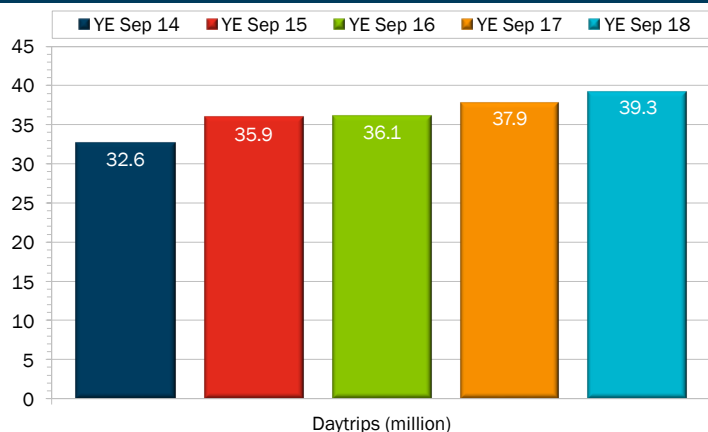
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Sep 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Regional NSW received nearly 39.3 million domestic daytrip visitors - up by 3.7% on YE Sep 17.

Note: The number of domestic daytrips to New South Wales increased by 5.1 percent* on last year and was up by 16.6 percent* compared to four years ago.

Market share

Regional NSW received 64.1% of daytrips to NSW. Compared to YE Sep 17, the share was down by 0.9% pts.

Main purpose of trip

'Holiday' (51.6%) was the largest purpose of trip for visitors to regional NSW, followed by 'visiting friends and relatives (VFR)' (27.2%) and 'business' (9.5%).

Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 7.0%* and 'VFR' increased by 3.5% while 'business' grew by 16.7%*.

Top activities in regional NSW

'Eat out, dine at a restaurant or cafe' (51.8%) was the most popular activity undertaken by visitors to regional NSW, followed by 'visit friends and relatives' (31.6%) and 'go shopping for pleasure' (18.6%).

Expenditure³

Domestic daytrip visitors spent nearly \$4.4 billion in regional NSW - up by 14.0%* on YE Sep 17. On average, they spent \$112 per trip - up by 9.9% on YE Sep 17.

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

Forecast⁵

Domestic visitor nights in regional NSW are expected to increase from over 71.0 million in 2016/17 to nearly 85.5 million in 2026/27, an average annual growth rate of 1.9%.

International visitor nights in regional NSW are expected to increase from nearly 14.4 million in 2016/17 to over 24.2 million in 2026/27, an average annual growth rate of 5.4%.

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

Further information

Please see www.destinationnsw.com.au for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.