

International Travel to NSW

Year ended December 2018

For the period of January 2018 to December 2018

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



Overview

NSW received nearly 4.4 million international overnight visitors - up by 3.0%* on YE Dec 17. Visitors spent over 96.2 million nights in the State - up by 2.4% on YE Dec 17.

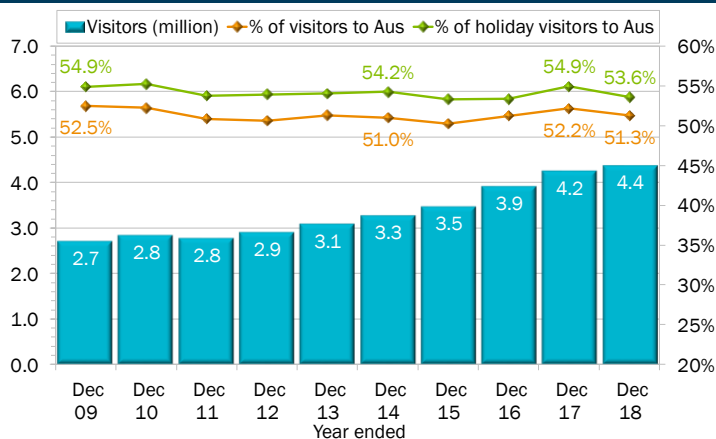
NSW received 51.3% of visitors and 35.1% of nights in Australia. Compared to YE Dec 17, the share of visitors was down by 0.9% pts and the share of nights was down by 0.5% pts.

The average length of stay in NSW was 22 nights - down by 0.1 night on YE Dec 17.

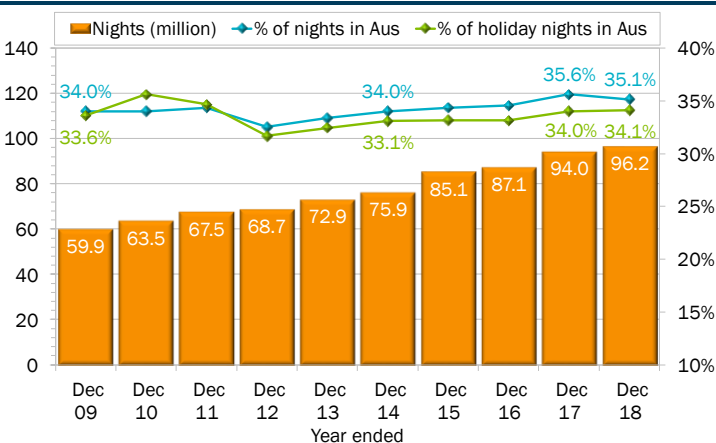
International overnight visitors spent \$10.7 billion in NSW (incl package expenditure) - up by 4.3% on YE Dec 17. This represented 35.5% of total expenditure in Australia. On average, visitors spent \$2,455 per visitor and \$112 per night in NSW. ⁽¹⁾

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

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	772	17.7%	21,095	3,595	170	27.3
2	USA	495	11.3%	4,857	762	157	9.8
3	New Zealand	441	10.1%	3,731	466	125	8.5
4	United Kingdom	372	8.5%	6,814	625	92	18.3
5	South Korea	205	4.7%	5,177	604	117	25.3
6	Japan	197	4.5%	4,127	406	98	21.0
7	India	164	3.7%	7,075	373	53	43.2
8	Hong Kong	131	3.0%	2,379	326	137	18.2
9	Germany	129	3.0%	2,724	219	80	21.1
10	Singapore	126	2.9%	1,451	252	174	11.5
11	Canada	110	2.5%	1,619	167	103	14.8
12	Taiwan	90	2.1%	2,584	235	91	28.6
13	Malaysia	89	2.0%	1,553	179	115	17.4
14	France	87	2.0%	2,271	194	85	26.1
15	Indonesia	87	2.0%	2,225	197	89	25.7
16	Philippines	75	1.7%	1,825	118	65	24.4
17	Italy	48	1.1%	1,343	116	86	28.2
18	Thailand	44	1.0%	1,594	145	91	36.3
19	Switzerland	38	0.9%	595	70	118	15.7
20	Netherlands	34	0.8%	595	56	94	17.4
21	Ireland	33	0.8%	758	64	85	23.0
	Other Asia	121	2.8%	5,803	442	76	48.1
	Scandinavia	71	1.6%	1,298	141	109	18.4
	Other Europe	121	2.8%	3,516	294	84	29.1
	Other Countries	291	6.7%	9,199	683	74	31.6
	Total NSW	4,370		96,204	10,729	112	22.0

Mainland China (772,100 or 17.7%) was the largest source market of international visitors to NSW, followed by the USA (495,300 or 11.3%) and New Zealand (441,400 or 10.1%). Compared to YE Dec 17, visitors from Mainland China declined by 2.1% while US visitors grew by 5.2% and New Zealand visitors increased by 0.2%.

Mainland China (21.1 million or 21.9%) was the biggest contributor of international visitor nights in the State, followed by India (7.1 million or 7.4%) and the United Kingdom (6.8 million or 7.1%). Compared to YE Dec 17, visitor nights from Mainland China grew by 6.4% and visitor nights from India increased by 21.0%* while visitor nights from the United Kingdom declined by 13.8%*.

Visitors from Mainland China spent the most in the State (\$3.6 billion), followed by US visitors (\$762 million) and visitors from the United Kingdom (\$625 million). Compared to YE Dec 17, expenditure by Mainland Chinese visitors grew by 11.1%* and spend by visitors from the USA increased by 0.6% while spend by UK visitors declined by 13.4%.

Visitors from Singapore (\$174) had the highest average spend per night in NSW, followed by Mainland Chinese visitors (\$170) and visitors from the USA (\$157).

Visitors from India (43.2 nights) had the longest average stay in NSW, followed by Thai visitors (36.3 nights) and visitors from Taiwan (28.6 nights).

Travel package

Over 1/8 (16.2%) of international overnight visitors who had been to NSW, arrived in Australia on a travel package. 'All accommodation' (86.9%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most ground transport within Australia' (69.5%) and 'airfares within Australia' (67.5%).

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

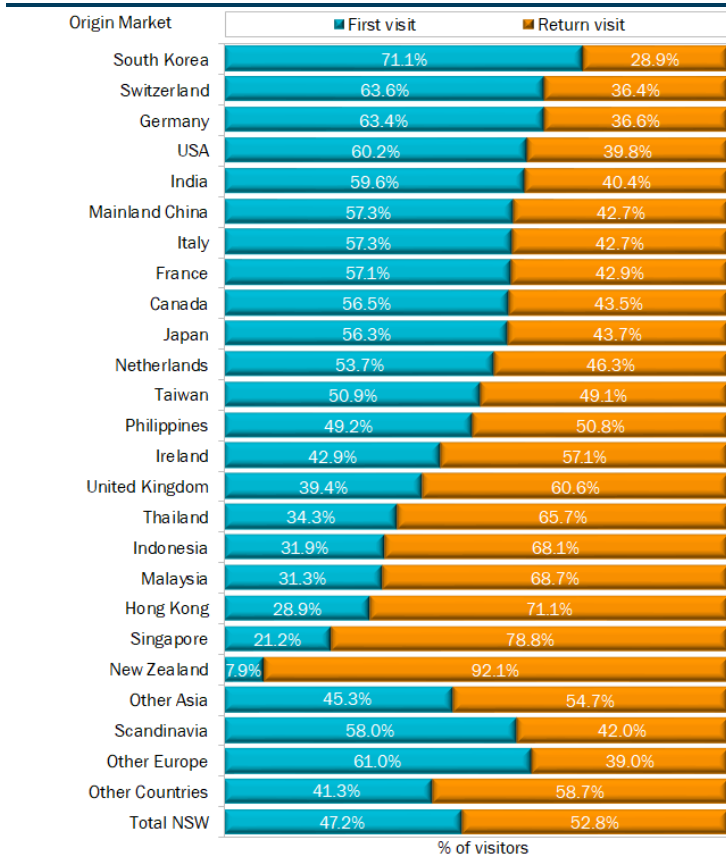
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Year ended December 2018

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Source: IVS, YE Dec 18, TRA - unless otherwise specified.

First or return visitor



Most international overnight visitors who had been to NSW (52.8%), were on a return trip to Australia- up by 1.5% pts on YE Dec 17.

International overnight visitors who had been to the State:

South Korean visitors (71.1%) had the highest percentage of first time travellers to Australia. Visitors from Switzerland (63.6%) had the 2nd highest proportion, followed by German visitors (63.4%).

New Zealand visitors (92.1%) had the highest proportion of repeat travellers. Visitors from Singapore (78.8%) had the 2nd highest proportion, followed by Hong Kong visitors (71.1%).

Length of stay

Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday	11.3	17.8	4	10
Visiting friends and relatives	22.5	23.7	12	15
Business	8.5	10.2	4	6
Employment	102.0	101.9	83	90
Education	116.8	122.4	95	114
Total other reasons	2.4	3.4	1	10
Total	22.0	32.1	5	10

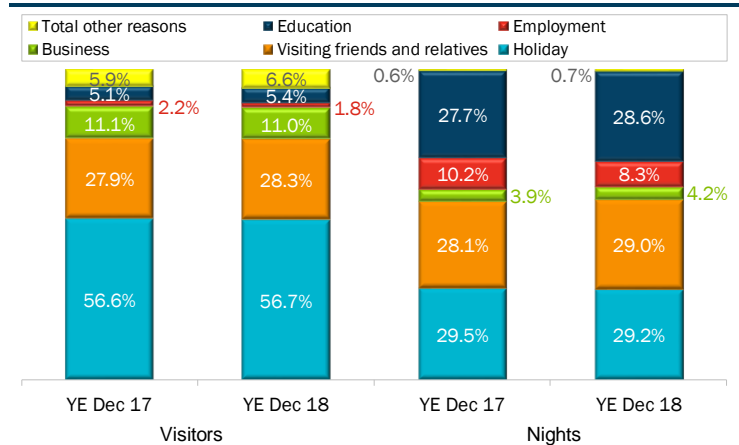
International visitors stayed on average 22 nights in NSW, while their average stay in Australia was 32.1 nights. The median length of stay in the State was 5 nights compared to 10 nights in Australia.

Compared to YE Dec 17, the average in NSW was down by 0.1 night and the median stay was unchanged.

Transport in NSW

'Aircraft' (29.1%) 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%).

Purpose of visit to NSW (4)



'Holiday' (56.7%) was the largest purpose of visit for **visitors** to NSW, followed by 'visiting friends and relatives (VFR)' (28.3%) and 'business' (11.0%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 3.3%* and 'VFR' increased by 4.5%* while 'business' grew by 2.2%.

'Holiday' (29.2%) was the largest purpose in terms of **nights** by international visitors in the State, followed by 'VFR' (29.0%) and 'education' (28.6%). Compared to YE Dec 17, nights spent for 'holiday' grew by 1.4% and 'VFR' increased by 5.3% while 'education' grew by 5.7%.

Origin of visitors	Holiday (%)	VFR (%)	Business (%)	Employment (%)	Education (%)	Other reasons (%)
South Korea	80.4	12.5	5.6	0.9	4.1	4.2
Germany	79.0	16.0	8.0	1.6	1.5	5.2
Taiwan	74.3	20.5	8.0	2.0	3.2	2.5
Netherlands	73.7	23.7	10.0	0.7	2.2	7.2
Switzerland	73.0	22.9	5.6	0.0	6.7	4.5
France	68.3	21.9	9.1	2.5	3.4	8.8
Japan	65.2	13.6	15.3	0.3	5.6	5.5
Mainland China	63.5	17.7	4.8	1.3	12.9	4.5
Canada	62.8	30.9	7.5	1.9	1.6	10.7
Malaysia	61.8	26.4	9.5	0.7	4.8	3.0
Italy	61.0	24.2	13.4	3.2	5.1	3.8
USA	60.3	22.4	13.8	1.2	2.6	9.2
Ireland	58.1	57.2	2.0	2.5	0.0	1.9
United Kingdom	57.6	43.1	9.5	2.2	0.7	6.2
Indonesia	53.5	33.3	5.9	1.7	5.4	5.8
Hong Kong	53.4	31.1	12.1	0.4	4.8	4.6
Singapore	48.8	21.9	28.8	1.0	3.1	2.7
Thailand	43.2	32.2	12.3	1.6	10.8	8.0
Philippines	39.8	44.5	10.0	4.5	2.9	11.6
India	39.1	41.5	12.5	5.8	3.9	3.7
New Zealand	30.1	41.2	22.9	2.1	1.5	10.4
Other Asia	36.0	51.2	7.6	2.6	10.3	3.1
Scandinavia	76.7	22.4	7.0	0.9	4.8	7.4
Other Europe	63.1	22.3	11.1	3.8	5.7	11.0
Other Countries	45.1	38.8	8.1	1.9	8.3	9.0
Total NSW	56.7	28.3	11.0	1.8	5.4	6.6

Of all international markets to NSW, South Korea (80.4%) had the highest proportion who visited the State for a holiday, followed by Germany (79.0%). Visitors from Singapore (28.8%) had the highest percentage who had visited for business, followed by New Zealand (22.9%).

(4) Visitors may have had more than one purpose for visiting NSW

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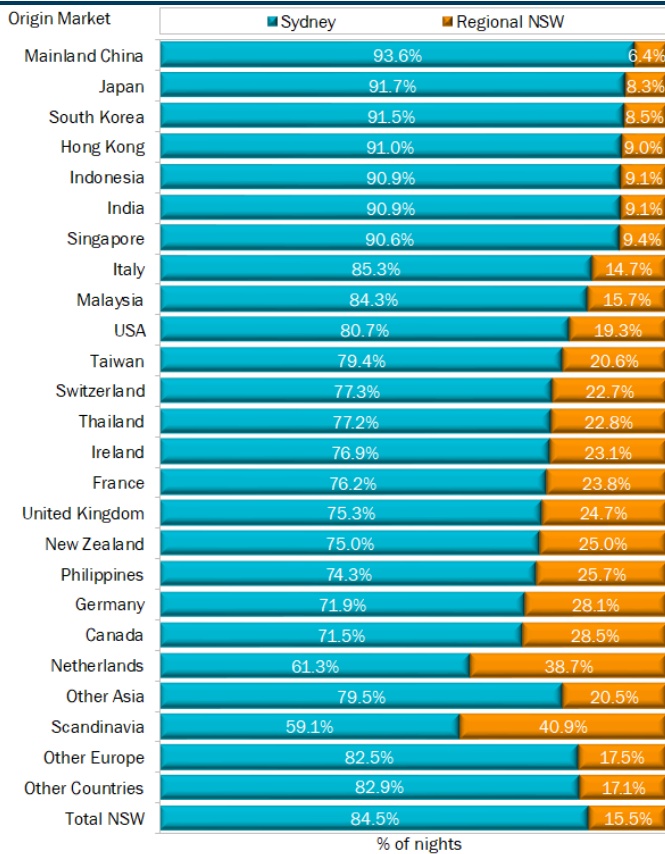
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	YE Dec 18	YE Dec 17	YE on YE growth
Visitors to NSW (million)	4.4	4.2	3.0%
Nights in NSW (million)	96.2	94.0	2.4%
Expenditure in NSW (billion)	\$10.7	\$10.3	4.3%
Expenditure per night in NSW	\$112	\$109	1.9%

Destinations in NSW

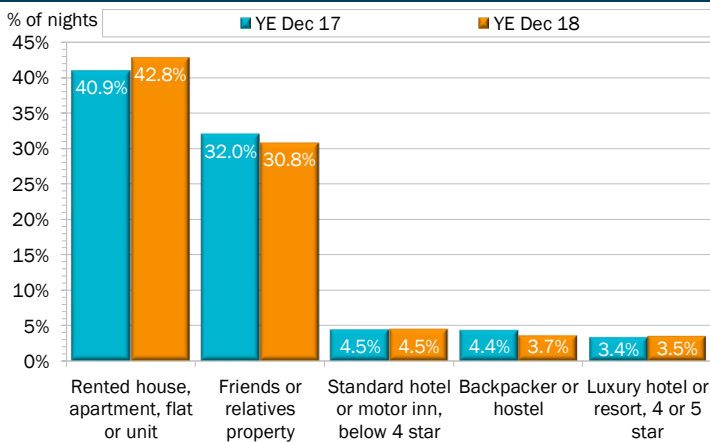


International overnight visitors spent 84.5% of their nights in Sydney – up by 0.2% pts on YE Dec 17.

Visitors from Mainland China (93.6%) had the highest proportion of nights spent in Sydney. Japanese visitors (91.7%) had the 2nd highest proportion, followed by South Koreans (91.5%).

Visitors from Netherlands (38.7%) had the highest proportion of nights in regional NSW. Canadian visitors (28.5%) had the 2nd highest proportion, followed by Germans (28.1%).

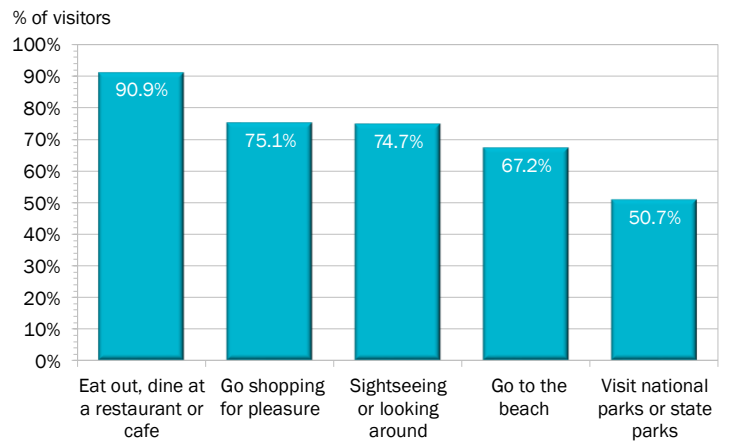
Accommodation in NSW



'Rented house, apartment, flat or unit' (42.8%) was the most popular accommodation type used for nights in NSW by international visitors, followed by 'friends or relatives property' (30.8%) and 'standard hotel or motor inn, below 4 star' (4.5%).

Compared to YE Dec 17, 'rented house, apartment, flat or unit' grew by 1.9% pts while 'friends or relatives property' decreased by 1.2% pts.

Top activities in Australia

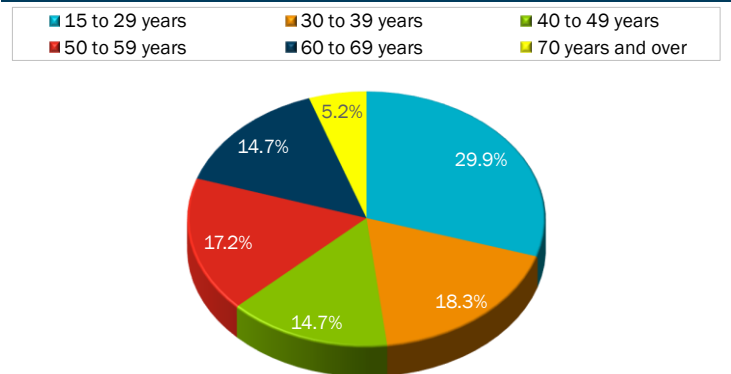


'Eat out, dine at a restaurant or cafe' (90.9%) was the most popular activity undertaken during the trip to Australia by international overnight visitors who had been to NSW. 'Go shopping for pleasure' (75.1%) was the 2nd most popular activity, followed by 'sightseeing or looking around' (74.7%).

Travel party

Over 1/2 (51.1%) of international overnight visitors who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (21.3%).

Age groups



'15 to 29 years' (29.9%) was the biggest age group amongst international overnight visitors to NSW, followed by '30 to 39 years' (18.3%) and '50 to 59 years' (17.2%).

Overview - Australia

Australia received over 8.5 million international visitors who spent nearly 273.8 million nights in Australia – up by 4.8%* and by 3.8%* respectively on YE Dec 17. On average, they stayed for 32.1 nights - down by 0.3 nights on YE Dec 17.

Visitors spent over \$30.2 billion (incl package expenditure) while in Australia - up by 8.0%* on YE Dec 17. On average, they spent \$3,547 per visitor and \$110 per night in Australia. ⁽¹⁾

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.

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