

Overview

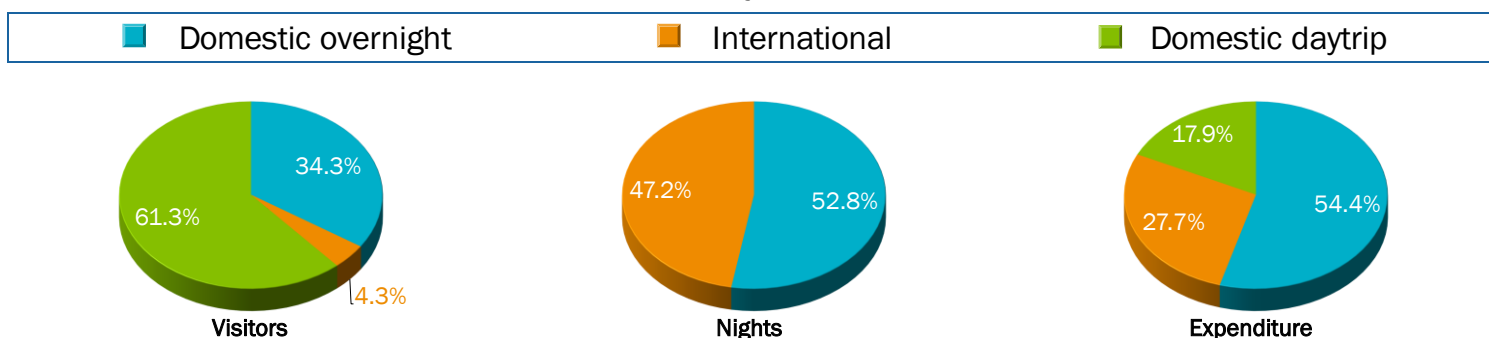
TOTAL TRAVEL ⁽¹⁾				
Estimate	% change		Market share	
100.6 million visitors	7.3%	↑	31.4%	-0.1% pt
Aus	7.7%	↑		
203.6 million nights	4.9%	↑	31.3%	-0.3% pts
Aus	5.7%	↑		
\$38.8 billion	10.6%	↑	30.9%	-0.1% pts
Aus	11.1%	↑		

Domestic overnight travel ⁽²⁾				
Estimate	% change		Market share	
34.6 million visitors	9.4% *	↑	32.7%	0.2% pts
Aus	8.6% *	↑		
107.4 million nights	7.3% *	↑	28.6%	0.1% pt
Aus	7.2% *	↑		
\$21.1 billion	13.1% *	↑	29.0%	0.1% pts
Aus	12.7% *	↑		

International overnight travel ⁽³⁾				
Estimate	% change		Market share	
4.4 million visitors	3.0% *	↑	51.3%	-0.9% pts
Aus	4.8% *	↑		
96.2 million nights	2.4%	↑	35.1%	-0.5% pts
Aus	3.8% *	↑		
\$10.7 billion	4.3%	↑	35.5%	-1.3% pts
Aus	8.0% *	↑		

Domestic daytrip travel ⁽²⁾				
Estimate	% change		Market share	
61.7 million visitors	6.5% *	↑	30.0%	-0.2% pts
Aus	7.4% *	↑		
\$6.9 billion	13.3% *	↑	30.8%	0.9% pts
Aus	10.2% *	↑		

NSW by sector



* The percentage change is statistically significant.

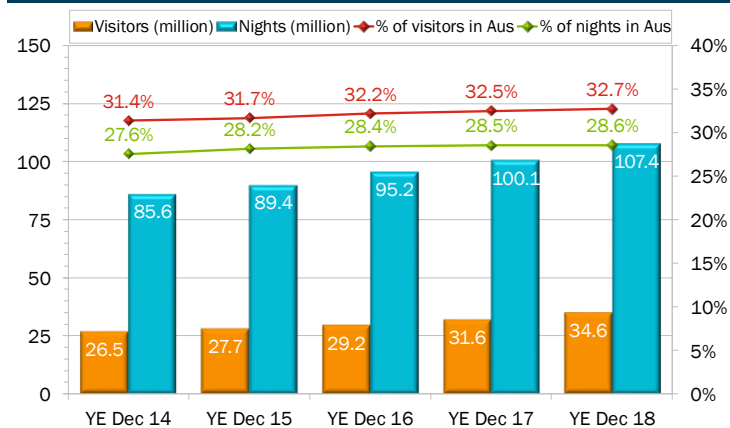
(1) Estimated using data from National Visitor Survey (NVS), International Visitor Survey (IVS) & Tourism Research Australia's (TRA) expenditure allocation method applied to NVS and IVS data, YE Dec 18.

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

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

Domestic Overnight Travel⁴

Visitors and nights

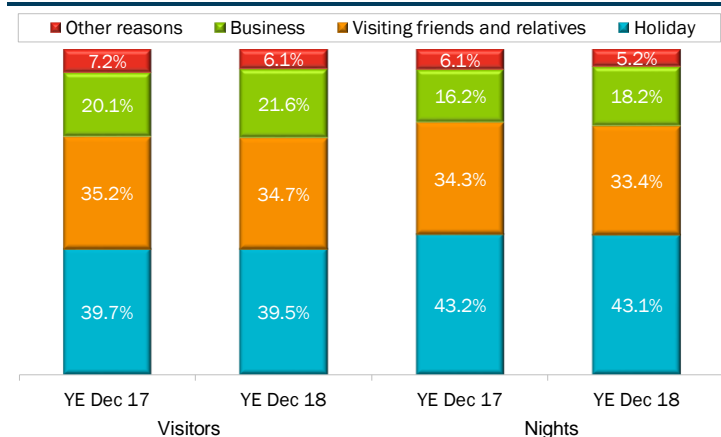


NSW received nearly 34.6 million domestic overnight visitors - up by 9.4%* on YE Dec 17. Visitors spent over 107.4 million nights in the State - up by 7.3%* on YE Dec 17.

Market share

NSW received 32.7% of visitors and 28.6% of nights in Australia. Compared to YE Dec 17, the share of visitors was up by 0.2% pts and the share of nights was up by 0.1% pt.

Purpose of visit to NSW



'Holiday' (39.5%) was the largest purpose of visit for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (34.7%) and 'business' (21.6%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 9.0%* and 'VFR' increased by 8.1%* while 'business' grew by 17.4%*.

'Holiday' (43.1%) was the largest purpose in terms of nights in the State, followed by 'VFR' (33.4%) and 'business' (18.2%). Compared to YE Dec 17, nights spent for 'holiday' grew by 7.1%* and 'VFR' increased by 4.4% while 'business' grew by 21.0%*.

Accommodation in NSW

'Friends or relatives property' (39.1%) was the most popular accommodation type used for nights in NSW, followed by 'standard hotel or motor inn, below 4 star' (13.8%) and 'caravan park or commercial camping ground' (9.6%).

Compared to YE Dec 17, 'friends or relatives property' increased by 0.5% 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	13,033	37.7%	36,406	6,460	177	2.8
Sydney	9,879	28.6%	28,077	5,924	211	2.8
Total intrastate	22,912	66.3%	64,483	12,384	192	2.8
Queensland	4,231	12.2%	15,548	2,925	188	3.7
Victoria	4,150	12.0%	14,728	3,285	223	3.5
ACT	1,853	5.4%	5,325	903	170	2.9
Other interstate	1,408	4.1%	7,328	1,599	218	5.2
Total interstate	11,642	33.7%	42,930	8,711	203	3.7
Total NSW	34,554		107,413	21,095	196	3.1

Regional NSW (13.0 million or 37.7%) was the largest source of visitors to the State, followed by Sydney (9.9 million or 28.6%) and Queensland (4.2 million or 12.2%). Compared to YE Dec 17, the regional NSW source market grew by 8.1%* and Sydney increased by 10.7%* while Queensland grew by 11.3%*.

Regional NSW (36.4 million or 33.9%) was the largest source market in terms of nights in the State, followed by Sydney (28.1 million or 26.1%) and Queensland (15.5 million or 14.5%). Compared to YE Dec 17, nights spent by visitors from regional NSW grew by 6.7%* and nights from Sydney increased by 10.2%* while nights by Queenslanders grew by 3.1%.

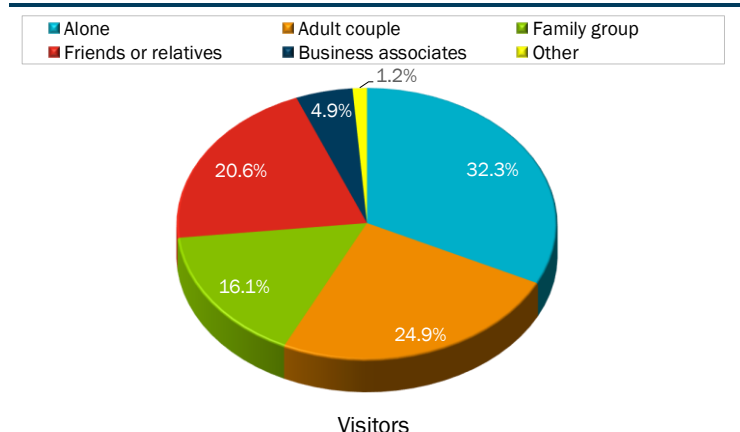
Transport in NSW

'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' (4.3%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (65.8%) was the most popular activity undertaken by visitors to the State. 'Visit friends and relatives' (45.7%) was the 2nd most popular, followed by 'sightseeing or looking around' (26.3%).

Travel party



'Alone' (32.3%) was the most common travel party amongst visitors to NSW. 'Adult couple' (24.9%) was the 2nd most common, followed by 'friends or relatives' (20.6%).

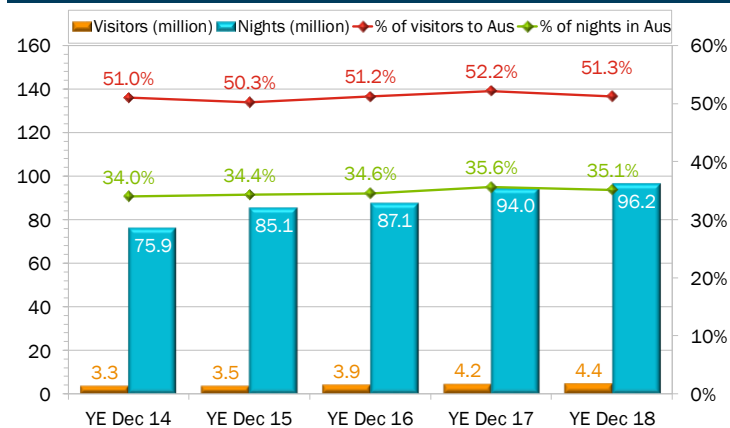
Expenditure (incl airfares and transport costs)⁶

Domestic overnight visitors spent \$21.1 billion in NSW - up by 13.1%* on YE Dec 17. On average, visitors spent \$196 per night in NSW - up by 5.4% on YE Dec 17.

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

International Overnight Travel⁵

Visitors and nights



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.

Market share

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.

Purpose of visit to NSW

'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%.

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	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
	Other markets	1,338	30.6%	36,776	3,101	84	27.5
	Total NSW	4,370		96,204	10,729	112	22.0

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%). 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.

Expenditure (incl 30% prepaid package expenditure)⁷

International overnight visitors spent \$10.7 billion in NSW - up by 4.3% on YE Dec 17. On average, visitors spent \$112 per night in NSW - up by 1.9% on YE Dec 17.

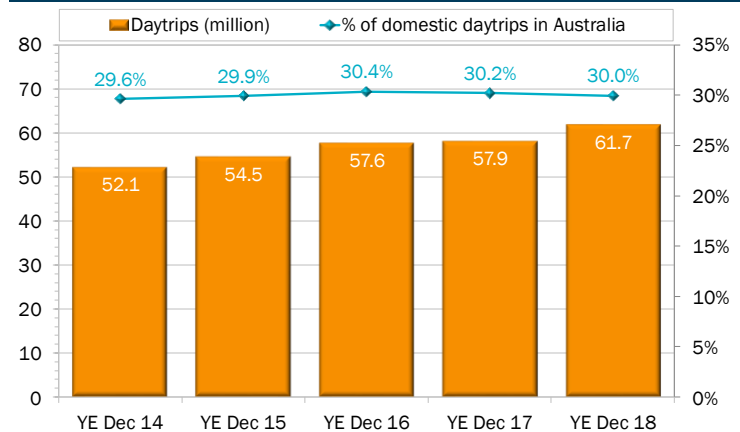
(7) Source: TRA's expenditure allocation method applied to IVS data, YE Dec 18.

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.

Domestic Daytrip Travel⁴

Daytrips



NSW received over 61.7 million domestic daytrip visitors - up by 6.5%* on YE Dec 17.

Market share

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

Main purpose of trip

'Holiday' (48.5%) was the largest purpose of trip for visitors to the State, followed by 'visiting friends and relatives (VFR)' (28.7%) and 'business' (10.9%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 7.9%* and 'VFR' increased by 5.6%* while 'business' grew by 21.5%*.

Age groups

'15 to 29 years' (21.0%) was the largest age group of visitors to the State, followed by '60 to 69 years' (17.6%) and '50 to 59 years' (16.3%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (51.9%) was the most popular activity undertaken by visitors to NSW, followed by 'visit friends and relatives' (33.7%).

Expenditure⁶

Domestic daytrip visitors spent \$6.9 billion in NSW - up by 13.3%* on YE Dec 17. On average, they spent \$112 per trip to the State - up by 6.4% on YE Dec 17.

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