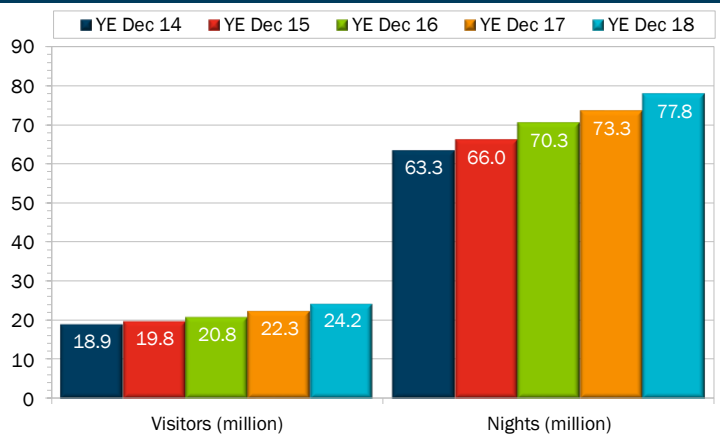


## Domestic Overnight Travel<sup>1</sup>

### Visitors and nights



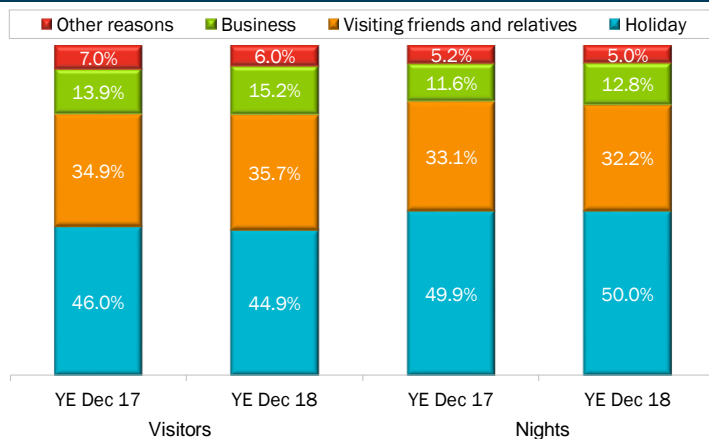
Regional NSW received over 24.2 million domestic overnight visitors - up by 8.5%\* on YE Dec 17. Visitors spent nearly 77.8 million nights in regional NSW - up by 6.1%\* on YE Dec 17.

Note: The number of domestic overnight trips to New South Wales increased by 9.4 percent\* on last year and by 30.4 percent\* compared to four years ago.

### Market share

Regional NSW received 70.1% of visitors and 72.4% of nights in NSW. Compared to YE Dec 17, the share of visitors was down by 0.6 pts and the share of nights was down by 0.8% pts.

### Purpose of visit to regional NSW



'Holiday' (44.9%) was the largest purpose of visit for visitors to regional NSW, followed by 'visiting friends and relatives (VFR)' (35.7%) and 'business' (15.2%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 5.7%\* and 'VFR' increased by 10.9%\* while 'business' grew by 18.3%\*.

'Holiday' (50.0%) was the largest purpose in terms of nights in regional NSW, followed by 'VFR' (32.2%) and 'business' (12.8%). Compared to YE Dec 17, nights spent for 'holiday' grew by 6.2% and 'VFR' increased by 3.0% while 'business' grew by 17.4%\*.

### Accommodation in regional NSW

'Friends or relatives property' (36.9%) was the most popular accommodation used for nights in regional NSW. 'Standard hotel or motor inn, below 4 star' (13.1%) was the 2<sup>nd</sup> most popular, followed by 'caravan park or commercial camping ground' (12.9%) and 'rented house, apartment, flat or unit' (10.2%).

### 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	8,949	36.9%	26,637	4,389	165	3.0
Sydney	9,000	37.1%	26,371	4,133	157	2.9
Total intrastate	17,949	74.1%	53,008	8,522	161	3.0
Queensland	2,684	11.1%	9,813	1,478	151	3.7
Victoria	1,943	8.0%	8,221	1,297	158	4.2
ACT	1,154	4.8%	3,724	509	137	3.2
Other interstate	500	2.1%	2,998	463	154	6.0
Total interstate	6,281	25.9%	24,756	3,747	151	3.9
Total regional NSW	24,230		77,764	12,269	158	3.2

Sydney (9.0 million or 37.1%) was the largest source of visitors to regional NSW, followed by regional NSW (8.9 million or 36.9%) and Queensland (2.7 million or 11.1%). Compared to YE Dec 17, the Sydney source market grew by 12.3%\* and regional NSW increased by 6.6%\* while Queensland grew by 8.8%\*.

Regional NSW (26.6 million or 34.3%) was the largest source market in terms of nights in regional NSW, followed by Sydney (26.4 million or 33.9%) and Queensland (9.8 million or 12.6%). Compared to YE Dec 17, nights spent by visitors from regional NSW grew by 3.6% and nights from Sydney increased by 12.9%\* while Queensland nights declined by 1.2%.

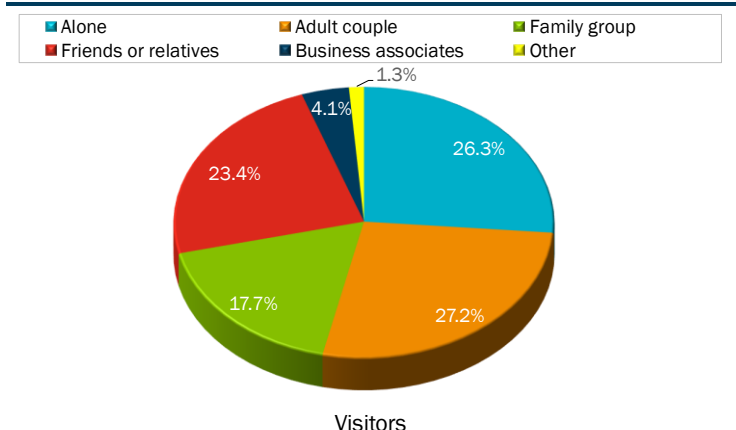
### Top activities in regional NSW

'Eat out, dine at a restaurant or cafe' (62.8%) was the most popular activity undertaken by visitors to regional NSW, followed by 'visit friends and relatives' (45.4%) and 'go to the beach' (28.1%).

### Age groups

'15 to 29 years' (22.8%) was the largest age group of visitors to regional NSW, followed by '50 to 59 years' (17.9%) and '30 to 39 years' (17.8%).

### Travel party



'Adult couple' (27.2%) was the most common travel party amongst visitors to regional NSW, followed by 'alone' (26.3%) and 'friends or relatives' (23.4%).

### Expenditure (incl airfares and transport costs)<sup>3</sup>

Domestic overnight visitors spent nearly \$12.3 billion in regional NSW - up by 8.1%\* on YE Dec 17. On average, they spent \$158 per night - up by 1.9% on YE Dec 17.

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

# Travel to Regional NSW

Year ended December 2018

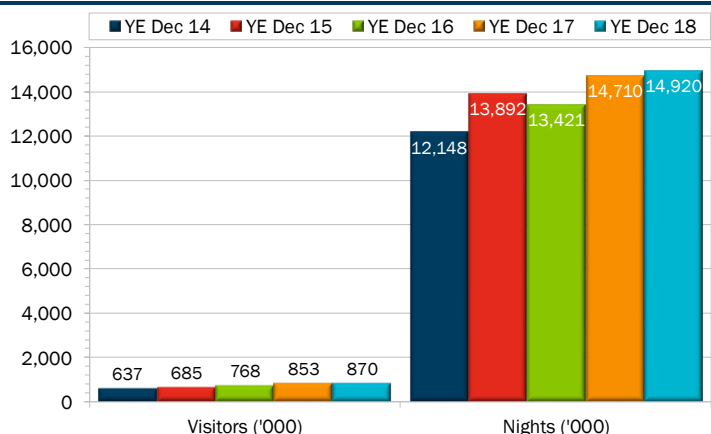
For the period of January 2018 to December 2018

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

	YE Dec 17	YE Dec 18	YE on YE growth	Share of regional NSW		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	60.9	64.5	5.9%	1.3%	37.5%	61.1%
Total nights (million)	88.0	92.7	5.3%	16.1%	83.9%	0.0%
Total spend (billion)	\$16.3	\$17.7	8.5%	5.8%	69.3%	24.9%

## International Overnight Travel<sup>2</sup>

### Visitors and nights



Regional NSW received 870,500 international overnight visitors - up by 2.0% on YE Dec 17. Visitors spent over 14.9 million nights in regional NSW - up by 1.4% on YE Dec 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 3.0 percent\* on last year and by 33.5 percent\* compared to four years ago.

### Market share

Regional NSW received 19.9% of visitors and 15.5% of nights in NSW. Compared to YE Dec 17, the share of visitors and the share of nights were down by 0.2% pts each.

### Purpose of visit to regional NSW

'Holiday' (64.7%) was the largest purpose of visit for visitors to regional NSW, followed by 'visiting friends and relatives (VFR)' (30.6%) and 'business' (5.5%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 2.6% and 'VFR' increased by 3.5% while 'business' grew by 1.2%.

### 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	143	16.5%	1,685	105	62	11.7
2	New Zealand	108	12.4%	933	84	90	8.6
3	USA	90	10.4%	936	73	78	10.3
4	Mainland China	59	6.7%	1,347	158	118	23.0
5	Germany	57	6.6%	765	38	50	13.4
6	Canada	33	3.8%	462	30	65	13.9
7	France	29	3.4%	540	22	41	18.4
8	South Korea	22	2.5%	441	25	58	20.0
9	Singapore	22	2.5%	np	22	158	np
10	Japan	19	2.2%	342	26	75	17.8
	Other markets	287	33.0%	7,334	438	60	25.5
	Total Reg NSW	870		14,920	1,021	68	17.1

### Accommodation in regional NSW

'Friends or relatives property' (36.3%) was the most popular form of accommodation for nights in regional NSW, followed by 'rented house, apartment, flat or unit' (27.3%).

### Expenditure (incl 30% prepaid package expenditure)<sup>4</sup>

International overnight visitors spent over \$1.0 billion in regional NSW - down by 1.4% on YE Dec 17. On average, they spent \$68 per night - down by 2.7% on YE Dec 17.

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

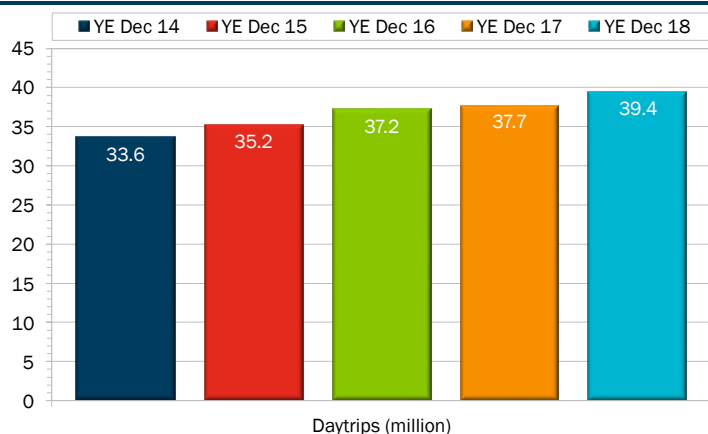
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

## Domestic Daytrip Travel<sup>4</sup>

### Daytrips



Regional NSW received over 39.4 million domestic daytrip visitors - up by 4.5%\* on YE Dec 17.

Note: The number of domestic daytrips to New South Wales increased by 6.5 percent\* on last year and was up by 18.4 percent\* compared to four years ago.

### Market share

Regional NSW received 63.9% of daytrips to NSW. Compared to YE Dec 17, the share was down by 1.2% pts.

### Main purpose of trip

'Holiday' (51.1%) was the largest purpose of trip for visitors to regional NSW, followed by 'visiting friends and relatives (VFR)' (26.9%) and 'business' (10.2%).

Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 6.9%\* and 'VFR' increased by 3.9% while 'business' grew by 22.6%\*.

### Top activities in regional NSW

'Eat out, dine at a restaurant or cafe' (52.2%) was the most popular activity undertaken by visitors to regional NSW, followed by 'visit friends and relatives' (31.7%) and 'sightseeing or looking around' (18.9%).

### Expenditure<sup>3</sup>

Domestic daytrip visitors spent over \$4.4 billion in regional NSW - up by 12.1%\* on YE Dec 17. On average, they spent \$112 per trip - up by 7.3% on YE Dec 17.

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

### Forecast<sup>5</sup>

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](http://www.destinationnsw.com.au) for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.