International Travel to NSW Visitor Profile
Year ended September 2020

Source: International Visitor Survey, Tourism Research Australia.

INTERNATIONAL VISITATION

Visitors
2.1m
-52.8% YoY

Nights
46.1m
-52.8% YoY

Expenditure
$5.1bn
-55.4% YoY

Average spend
$111 per night
$2,464 per visitor

Average length of stay
22.3 nights

Source: International Visitor Survey, Tourism Research Australia.

Market share to Australia

<table>
<thead>
<tr>
<th>Visitors</th>
<th>Nights</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>34%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Time series

Expenditure ($bn)

YE SEP 2015: $7.9
YE SEP 2016: $9.1
YE SEP 2017: $10.2
YE SEP 2018: $10.7
YE SEP 2019: $11.4
YE SEP 2020: $5.1

Purpose of visit

Visitors
Holiday: 55%
VFR: 30%
Business: 9%
Education: 5%
Employment: 2%

Nights
Holiday: 31%
VFR: 16%
Business: 7%
Education: 16%
Employment: 7%

Expenditure
Holiday: 38%
VFR: 13%
Business: 17%
Education: 38%
Employment: 7%

Visitor dispersal

20% of international visitors to NSW visited Regional NSW

Regional NSW: 20%
North Coast NSW: 8.5%
South Coast: 4.2%
Sydney: 93%

Top 5 origin markets

China was the largest individual source market of visitors to NSW

China: 14%
United States of America: 13%
United Kingdom: 11%
New Zealand: 9%
Japan: 4%

Top 3 accommodation types (nights)

Rented house/apartment/flat or unit: 43%
Friends or relatives property: 30%
Backpacker or hostel: 4%

Top 5 activities

Eat out / dine at a restaurant and/or cafe: 91%
Sightseeing/looking around: 76%
Go shopping for pleasure: 75%
Go to the beach: 71%
Visit national parks / state parks: 51%

Note: Number of visitors by visitor type may not add up to total due to rounding; percentages may not add up to 100% due to rounding; n/p indicates data not publishable.
'15-29 years' was the largest age group of international visitors to NSW

91% of all visitors from Total to NSW were non-group visitors

Non group tour 91%

Group tour 9%

Aircraft, 28%

Private vehicle or company car, 25%

91% of international visitors to NSW were travelling alone

Unaccompanied 51%

Family group 11%

Adult couple 25%

Friends and/or relatives 10%

First vs Return visitor

Return visitor to Australia 55%

First time visitor to Australia 45%

Group tour 85%

Non package tour 15%

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AVIATION

Inbound seats to NSW 5,888,629 seats -46.2% YoY

41% of the total inbounds seats to Australia

Inbound flights to NSW 20,573 flights -46.6% YoY

38% of the total inbounds flights to Australia

Source: OAG YE September 2020, International flight and seat capacity based on direct non-stop services.

Source: TRA, YE September 2020, short term arrivals to NSW.

Top 15 source markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Visitors (000)</th>
<th>Nights (million)</th>
<th>Expenditure ($million)</th>
<th>ALOS</th>
<th>Spend per night ($)</th>
<th>Spend per visitor ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>291</td>
<td>8.5</td>
<td>$1,466</td>
<td>29.1</td>
<td>$173</td>
<td>$5,031</td>
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<tr>
<td>United States of America</td>
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<td>$460</td>
<td>9.8</td>
<td>$170</td>
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<tr>
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<tr>
<td>NSW Total</td>
<td>2,073</td>
<td>46.1</td>
<td>$5,108</td>
<td>22.3</td>
<td>$111</td>
<td>$2,464</td>
</tr>
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