Domestic Overnight Travel (1)

Visitors and nights

<table>
<thead>
<tr>
<th></th>
<th>YE Dec 09</th>
<th>YE Dec 10</th>
<th>YE Dec 11</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors (million)</td>
<td>7.0</td>
<td>7.4</td>
<td>7.8</td>
<td>7.8</td>
<td>8.3</td>
</tr>
<tr>
<td>Nights (million)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sydney received over 8.3 million domestic overnight visitors - up by 7.2%* on YE Dec 12. Visitors spent nearly 22.3 million nights in the region - up by 2.1% on YE Dec 12.

Note: The number of domestic overnight trips to New South Wales increased by 3.7 percent* on last year and by 12.0 percent* compared to four years ago.

Market share

The region received 32.4% of visitors and 26.0% of nights in NSW. Compared to YE Dec 12, the share of visitors was up by 1.1% pts and the share of nights was unchanged.

Purpose of visit to the region

<table>
<thead>
<tr>
<th></th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
<th>YE Dec 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>5.9%</td>
<td>5.9%</td>
<td>5.9%</td>
<td>5.9%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Business</td>
<td>27.6%</td>
<td>27.6%</td>
<td>27.6%</td>
<td>27.6%</td>
<td>27.6%</td>
</tr>
<tr>
<td>VFR</td>
<td>38.9%</td>
<td>38.9%</td>
<td>38.9%</td>
<td>38.9%</td>
<td>38.9%</td>
</tr>
<tr>
<td>Holiday</td>
<td>28.6%</td>
<td>28.6%</td>
<td>28.6%</td>
<td>28.6%</td>
<td>28.6%</td>
</tr>
</tbody>
</table>

‘Visiting friends and relatives (VFR)’ (37.7%) was the largest purpose of visit for visitors to the region, followed by ‘holiday or leisure’ (29.2%) and ‘business’ (26.5%). Compared to YE Dec 12, visitors who travelled for ‘VFR’ grew by 3.8% and ‘holiday or leisure’ increased by 9.5%* while ‘business’ grew by 3.2%.

‘VFR’ (40.1%) was the largest purpose in terms of nights in the region, followed by ‘holiday or leisure’ (28.4%) and ‘business’ (22.0%). Compared to YE Dec 12, nights spent for ‘VFR’ decreased by 11.3% while ‘holiday or leisure’ grew by 12.4% and ‘business’ increased by 10.3%.

Accommodation

‘Friends or relatives property’ (49.9%) was the most popular accommodation used for nights in the region, followed by ‘standard hotel, motor inn, below 4 star’ (17.5%) and ‘luxury hotel or resort, 4 or 5 star’ (14.7%).

Origin

<table>
<thead>
<tr>
<th>Origin</th>
<th>YE Dec 09</th>
<th>YE Dec 10</th>
<th>YE Dec 11</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional NSW</td>
<td>43.0%</td>
<td>42.3%</td>
<td>37.9%</td>
<td>37.3%</td>
<td></td>
</tr>
<tr>
<td>Sydney</td>
<td>8.6%</td>
<td>8.8%</td>
<td>5.6%</td>
<td>7.4%</td>
<td></td>
</tr>
<tr>
<td>Total intrastate</td>
<td>51.6%</td>
<td>51.0%</td>
<td>43.5%</td>
<td>44.8%</td>
<td></td>
</tr>
<tr>
<td>Victoria</td>
<td>19.6%</td>
<td>17.7%</td>
<td>17.9%</td>
<td>15.8%</td>
<td></td>
</tr>
<tr>
<td>Queensland</td>
<td>13.7%</td>
<td>13.6%</td>
<td>18.5%</td>
<td>18.6%</td>
<td></td>
</tr>
<tr>
<td>ACT</td>
<td>6.3%</td>
<td>8.0%</td>
<td>4.7%</td>
<td>6.2%</td>
<td></td>
</tr>
<tr>
<td>Other interstate</td>
<td>8.9%</td>
<td>9.7%</td>
<td>15.3%</td>
<td>14.6%</td>
<td></td>
</tr>
<tr>
<td>Total interstate</td>
<td>48.4%</td>
<td>49.0%</td>
<td>56.5%</td>
<td>55.2%</td>
<td></td>
</tr>
</tbody>
</table>

Regional NSW (42.3%) was the largest source of visitors to the region, followed by Victoria (17.7%) and Queensland (13.6%). Compared to YE Dec 12, the regional NSW source market grew by 5.4% and Sydney increased by 9.4%. Over the same period, Victoria declined by 3.6% while Queensland increased by 6.7% and the ACT grew by 37.0%*.

Regional NSW (37.3%) was the largest source market in terms of nights in the region, followed by Queensland (18.6%) and Victoria (15.8%). Compared to YE Dec 12, nights spent by visitors from regional NSW grew by 0.6% and nights from Sydney increased by 34.8%*. Over the same period, nights by Victorians declined by 9.9% while Queensland nights increased by 2.8% and nights by visitors from the ACT grew by 32.6%.

All transport

‘Private or company vehicle’ (50.5%) was the most popular form of transport used by visitors to the region, followed by ‘air transport’ (39.8%) and ‘railway’ (7.1%).

Activities

‘Eat out at restaurants’ (66.7%) was the most popular activity undertaken by visitors to the region, followed by ‘visit friends and relatives’ (50.5%) and ‘shopping for pleasure’ (29.1%).

Australian Travel Mindsets (2)

<table>
<thead>
<tr>
<th>Mindset</th>
<th>YE Dec 09</th>
<th>YE Dec 10</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxed</td>
<td>28%</td>
<td>29%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Mindful</td>
<td>20%</td>
<td>19%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Mindset</td>
<td>52%</td>
<td>52%</td>
<td>53%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Pampadours - want luxury; Compatriots - mostly families; True travellers - want depth of experience; Peer group travellers - seeking a fun experience with friends; and Wanderers - taking time to explore and discover.

(2) Source: Inside Story, 2YE Jun 13

Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent over $6.0 billion in the region - up by 11.5%* on YE Dec 12. On average, they spent $270 per night - up by 9.2% on YE Dec 12.

(3) Source: Modelled domestic overnight visitor expenditure in Australia’s regions, YE Dec 13, TRA

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.

(1) Source: National Visitor Survey (NVS), YE Dec 13, Tourism Research Australia (TRA)

(2) Source: Inside Story, 2YE Jun 13

(3) Source: Modelled domestic overnight visitor expenditure in Australia’s regions, YE Dec 13, TRA
Travel to Sydney
Year ended December 2013

International Overnight Travel (4)

Daytrips

Sydney received over 2.8 million international overnight visitors - up by 6.2%* on YE Dec 12. Visitors spent nearly 61.5 million nights in the region - up by 6.7%* on YE Dec 12.

Note: The number of overnight trips to New South Wales by international visitors increased by 5.7 percent* on last year and by 12.6 percent* compared to four years ago.

Market share

The region received 93.7% of visitors and 84.4% of nights in NSW. Compared to YE Dec 12, the share of visitors was up by 0.5% pts and the share of nights was up by 0.8% pts.

Purpose of visit to the region

‘Holiday / pleasure’ (54.7%) was the largest purpose of visit for visitors to the region, followed by ‘visiting friends and relatives (VFR)’ (25.1%) and ‘business’ (13.1%). Compared to YE Dec 12, visitors who travelled for ‘holiday / pleasure’ grew by 8.8%* and ‘VFR’ increased by 6.7%* while ‘business’ grew by 4.9%.

Origin – share of visitors to the region

Accommodation

‘Rented house / apartment / unit / flat’ (45.3%) was the most popular form of accommodation used for nights in the region, followed by ‘home of friend or relative’ (28.7%) and ‘backpacker / hostel’ (6.3%).

Expenditure (incl pre-paid package expenditure) (5)

International overnight visitors spent over $6.0 billion in the region - up by 7.2%* on YE Dec 12. On average, they spent $98 per night - up by 0.4% on YE Dec 12.

(5) Source: Modelled international overnight visitor expenditure in Australia’s regions, YE Dec 13, TRA.

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.

(4) Source: International Visitor Survey (IVS), YE Dec 13, TRA
(6) Source: NVS, YE Dec 13, TRA

Daytrips (million)

Sydney received over 19.4 million domestic daytrip visitors - down by 4.2% on YE Dec 12.

Note: The number of domestic daytrips to New South Wales decreased by 5.4 percent* on last year, but was up by 10.1 percent* compared to four years ago.

Market share

The region received 37.4% of daytrips to NSW. Compared to YE Dec 12, the share was up by 0.5% pts.

Main purpose of trip

‘Holiday or leisure’ (44.8%) was the largest purpose of trip for visitors to the region, followed by ‘visiting friends and relatives (VFR)’ (31.2%) and ‘business’ (11.2%). Compared to YE Dec 12, visitors who travelled for ‘holiday or leisure’ declined by 6.5% and ‘VFR’ decreased by 3.1% while ‘business’ fell by 13.5%.

Activities

% of visitors

Expenditure (7)

Domestic daytrip visitors spent over $2.1 billion in the region - down by 4.9% on YE Dec 12. On average, they spent $111 per trip - down by 0.8% on YE Dec 12.

(7) Source: Modelled domestic day visitor expenditure in Australia’s regions, YE Dec 13, TRA

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.