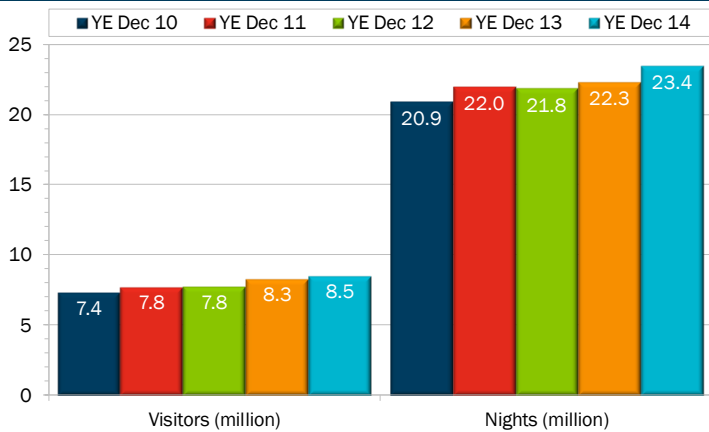


Domestic Overnight Travel (1)

Visitors and nights



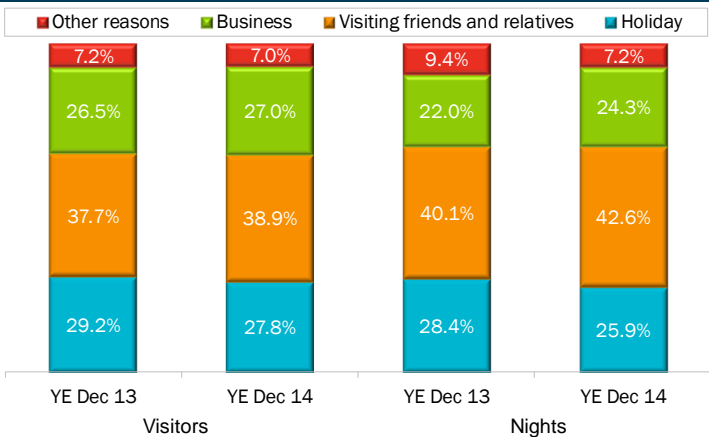
Sydney received over 8.5 million domestic overnight visitors - up by 2.3% on YE Dec 13. Visitors spent over 23.4 million nights in the region - up by 5.1% on YE Dec 13.

Note: The number of domestic overnight trips to New South Wales increased by 4.7 percent* on last year and by 14.2 percent* compared to four years ago.

Market share

The region received 31.7% of visitors and 26.8% of nights in NSW. Compared to YE Dec 13, the share of visitors was down by 0.8% pts and the share of nights was up by 0.7% pts.

Purpose of visit to the region



'Visiting friends and relatives (VFR)' (38.9%) was the largest purpose of visit for visitors to the region, followed by 'holiday' (27.8%) and 'business' (27.0%). Compared to YE Dec 13, visitors who travelled for 'VFR' grew by 5.5% while 'holiday' decreased by 2.6% and 'business' increased by 4.1%.

'VFR' (42.6%) was the largest purpose in terms of nights in the region, followed by 'holiday' (25.9%) and 'business' (24.3%). Compared to YE Dec 13, nights spent for 'VFR' grew by 11.8% while 'holiday' decreased by 4.2% and 'business' increased by 15.8%.

Accommodation

'Friends or relatives property' (49.0%) was the most popular accommodation used for nights in the region, followed by 'standard hotel or motor inn, below 4 star' (19.3%) and 'luxury hotel or resort, 4 or 5 star' (14.8%).

Origin

Origin	Share of visitors		Share of nights	
	YE Dec 13	YE Dec 14	YE Dec 13	YE Dec 14
Regional NSW	42.3%	42.5%	37.3%	35.7%
Sydney	8.8%	9.0%	7.4%	6.6%
Total intrastate	51.0%	51.5%	44.8%	42.2%
Victoria	17.7%	17.7%	15.8%	18.0%
Queensland	13.6%	14.5%	18.6%	19.4%
ACT	8.0%	6.3%	6.2%	5.4%
Other interstate	9.7%	9.9%	14.6%	15.0%
Total interstate	49.0%	48.5%	55.2%	57.8%

Regional NSW (42.5%) was the largest source of visitors to the region, followed by Victoria (17.7%) and Queensland (14.5%). Compared to YE Dec 13, the regional NSW source market grew by 2.9% and Sydney increased by 5.2%. Over the same period, Victoria grew by 2.7% and Queensland increased by 9.0% while the ACT decreased by 19.4%*.

Regional NSW (35.7%) was the largest source market in terms of nights in the region, followed by Queensland (19.4%) and Victoria (18.0%). Compared to YE Dec 13, nights spent by visitors from regional NSW grew by 0.5% while nights from Sydney decreased by 7.4%. Over the same period, nights by Queenslanders grew by 9.6% and Victorian nights increased by 19.3% while nights by visitors from the ACT declined by 8.3%.

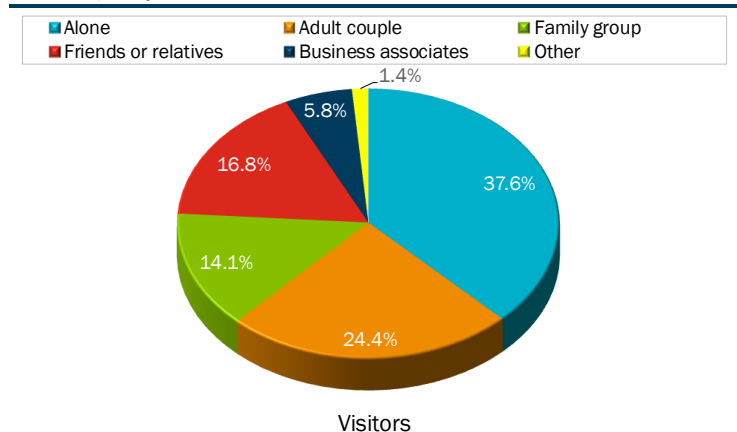
All transport

'Private vehicle or company car' (49.9%) was the most popular form of transport used by visitors to the region, followed by 'aircraft' (40.1%) and 'railway' (8.1%).

Activities

'Eat out, dine at a restaurant or cafe' (65.2%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (54.7%) and 'go shopping for pleasure' (24.9%).

Travel party



'Alone' (37.6%) was the most common travel party amongst visitors to the region, followed by 'adult couple' (24.4%).

Expenditure (incl airfares and transport costs) (2)

Domestic overnight visitors spent nearly \$6.1 billion in the region - up by 0.9% on YE Dec 13. On average, they spent \$259 per night - down by 4.0% on YE Dec 13.

(2) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Dec 14, 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.

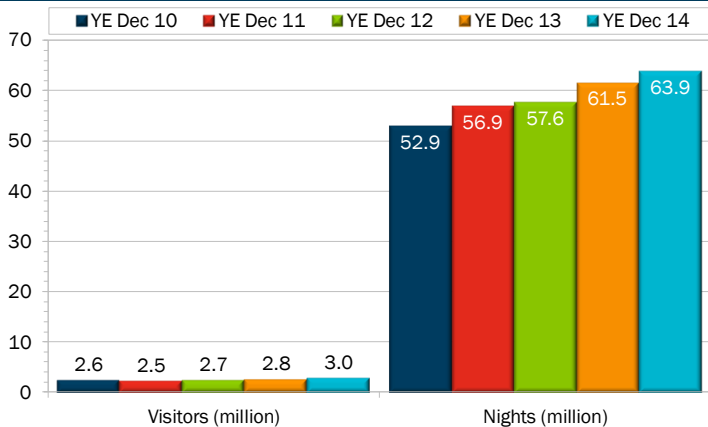
np = Not published due to insufficient sample.

(1) Source: National Visitor Survey (NVS), YE Dec 14, Tourism Research Australia (TRA)

Total visitors (million)	30.5
Total nights (million)	87.3
Total expenditure (billion)	\$14.5

International Overnight Travel (3)

Visitors and nights



Sydney received over 3.0 million international overnight visitors - up by 6.7%* on YE Dec 13. Visitors spent nearly 63.9 million nights in the region - up by 3.8% on YE Dec 13.

Note: The number of overnight trips to New South Wales by international visitors increased by 6.7 percent* on last year and by 14.9 percent* compared to four years ago.

Market share

The region received 93.7% of visitors and 84.0% of nights in NSW. Compared to YE Dec 13, the share of visitors was unchanged and the share of nights was down by 0.4% pts.

Purpose of visit to the region

'Holiday' (56.0%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (24.4%) and 'business' (12.7%). Compared to YE Dec 13, visitors who travelled for 'holiday' grew by 9.2%* and 'VFR' increased by 3.6% while 'business' grew by 3.5%.

Origin - share of visitors to the region

Share of international visitors to Sydney							
Rank	Market	YE Dec 13	YE Dec 14	Rank	Market	YE Dec 13	YE Dec 14
1	Mainland China	14.0%	15.5%	14	Scandinavia	1.9%	1.9%
2	New Zealand	11.8%	11.3%	15	Taiwan	1.8%	1.8%
3	USA	10.0%	10.3%	16	Indonesia	2.0%	1.8%
4	United Kingdom	10.9%	10.1%	17	Italy	1.4%	1.4%
5	South Korea	5.2%	4.7%	18	Thailand	1.1%	1.1%
6	Japan	5.0%	4.5%	19	Philippines	0.9%	1.1%
7	Germany	3.5%	3.8%	20	Switzerland	1.1%	1.0%
8	Singapore	3.6%	3.5%	21	Ireland	1.0%	0.9%
9	Hong Kong	3.1%	3.2%	22	Netherlands	0.9%	0.8%
10	India	2.7%	3.0%				
11	Canada	2.6%	2.5%		Other Asia	1.6%	1.7%
12	Malaysia	2.3%	2.5%		Other Europe	2.8%	2.8%
13	France	2.5%	2.4%		Other Countries	6.5%	6.4%

Accommodation

'Rented house, apartment, flat or unit' (42.9%) was the most popular form of accommodation used for nights in the region, followed by 'friends or relatives property' (30.9%) and 'backpacker or hostel' (5.8%).

Expenditure (incl pre-paid package expenditure) (4)

International overnight visitors spent nearly \$6.4 billion in the region - up by 5.5% on YE Dec 13. On average, they spent \$100 per night - up by 1.7% on YE Dec 13.

(4) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Dec 14, TRA.

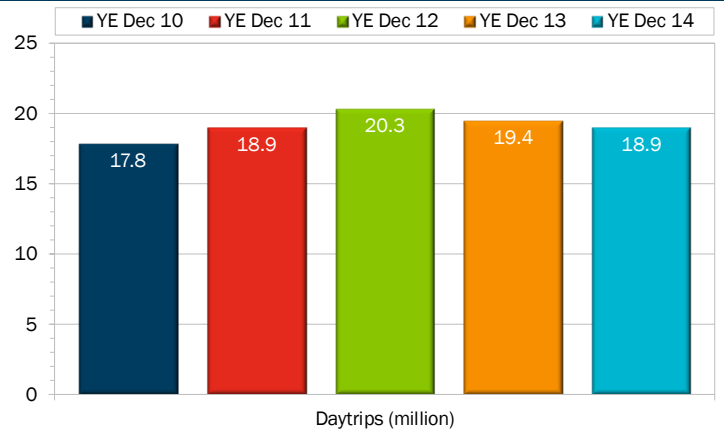
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(3) Source: International Visitor Survey (IVS), YE Dec 14, TRA

Domestic Daytrip Travel (5)

Daytrips



Sydney received over 18.9 million domestic daytrip visitors - down by 2.5% on YE Dec 13.

Note: The number of domestic daytrips to New South Wales decreased by 1.8 percent on last year, but was up by 2.5 percent compared to four years ago.

Market share

The region received 37.1% of daytrips to NSW. Compared to YE Dec 13, the share was down by 0.3% pts.

Main purpose of trip

'Holiday' (42.6%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (31.9%) and 'business' (12.1%).

Compared to YE Dec 13, visitors who travelled for 'holiday' declined by 7.3% and 'VFR' decreased by 0.2% while 'business' grew by 4.6%.

Activities

'Eat out, dine at a restaurant or cafe' (44.1%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (39.8%) and 'go shopping for pleasure' (17.4%).

Expenditure (6)

Domestic daytrip visitors spent over \$2.0 billion in the region - down by 6.5% on YE Dec 13. On average, they spent \$106 per trip - down by 4.0% on YE Dec 13.

(6) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Dec 14, TRA

Notes and further information

Due to changes to the National Visitor Survey (NVS) methodology, care should be taken when comparing year ending December 2014 survey results with those from previous years. These changes represent a break in the time series.

For more information on the NVS methodology changes please see www.tra.gov.au/News&Media/Factsheets-2014-updates-to-the-IVS/NVS.

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.

np = Not published due to insufficient sample.

(5) Source: NVS, YE Dec 14, TRA