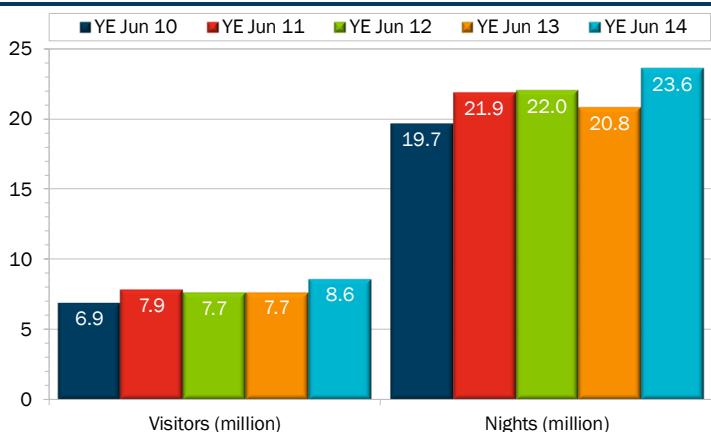


Domestic Overnight Travel (1)

Visitors and nights



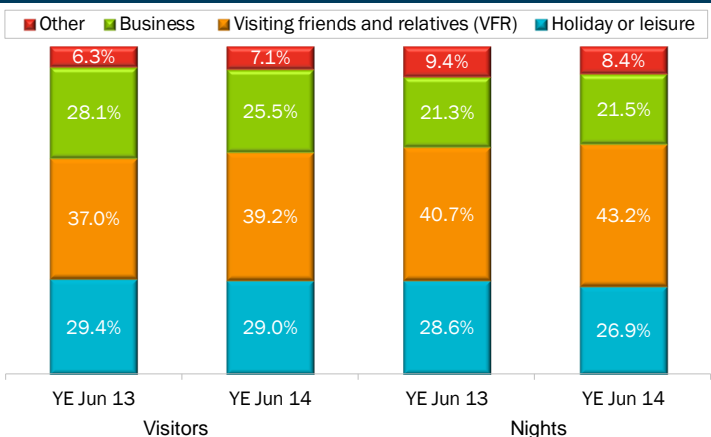
Sydney received over 8.6 million domestic overnight visitors - up by 12.0%* on YE Jun 13. Visitors spent over 23.6 million nights in the region - up by 13.5%* on YE Jun 13.

Note: The number of domestic overnight trips to New South Wales increased by 6.1 percent* on last year and by 14.1 percent* compared to four years ago.

Market share

The region received 32.5% of visitors and 27.2% of nights in NSW. Compared to YE Jun 13, the share of visitors was up by 1.7% pts and the share of nights was up by 2.6% pts.

Purpose of visit to the region



'Visiting friends and relatives (VFR)' (39.2%) was the largest purpose of visit for visitors to the region, followed by 'holiday or leisure' (29.0%) and 'business' (25.5%). Compared to YE Jun 13, visitors who travelled for 'VFR' grew by 18.7%* and 'holiday or leisure' increased by 10.2%* while 'business' grew by 1.5%.

'VFR' (43.2%) was the largest purpose in terms of nights in the region, followed by 'holiday or leisure' (26.9%) and 'business' (21.5%). Compared to YE Jun 13, nights spent for 'VFR' grew by 20.6%* and 'holiday or leisure' increased by 6.6% while 'business' grew by 14.8%.

Accommodation

'Friends or relatives property' (51.3%) was the most popular accommodation used for nights in the region, followed by 'standard hotel, motor inn, below 4 star' (16.5%) and 'luxury hotel or resort, 4 or 5 star' (14.6%).

Origin

Origin	Share of visitors		Share of nights	
	YE Jun 13	YE Jun 14	YE Jun 13	YE Jun 14
Regional NSW	43.4%	42.7%	37.9%	37.5%
Sydney	7.9%	10.0%	6.0%	8.4%
Total intrastate	51.3%	52.7%	43.8%	45.8%
Victoria	18.7%	16.7%	17.6%	15.4%
Queensland	14.2%	13.5%	20.4%	17.2%
ACT	7.0%	6.8%	5.7%	5.9%
Other interstate	8.7%	10.3%	12.4%	15.7%
Total interstate	48.7%	47.3%	56.2%	54.2%

Regional NSW (42.7%) was the largest source of visitors to the region, followed by Victoria (16.7%) and Queensland (13.5%). Compared to YE Jun 13, the regional NSW source market grew by 10.0%* and Sydney increased by 41.9%*. Over the same period, Victoria grew by 0.1% and Queensland increased by 6.2% while the ACT grew by 8.1%.

Regional NSW (37.5%) was the largest source market in terms of nights in the region, followed by Queensland (17.2%) and Victoria (15.4%). Compared to YE Jun 13, nights spent by visitors from regional NSW grew by 12.3% and nights from Sydney increased by 58.8%*. Over the same period, nights by Queenslanders declined by 4.5% and Victorian nights fell by 1.0% while nights by visitors from the ACT grew by 16.2%.

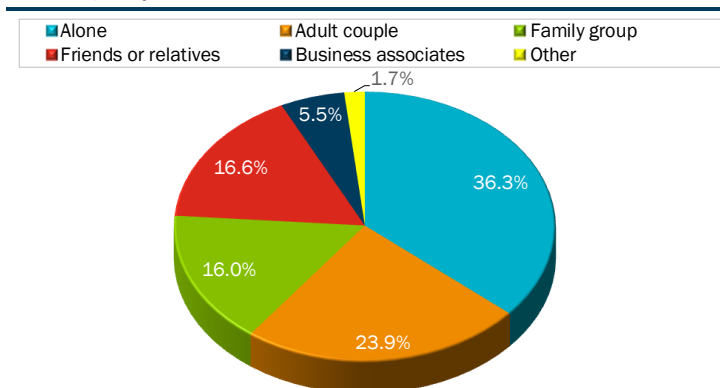
All transport

'Private or company vehicle' (49.3%) was the most popular form of transport used by visitors to the region, followed by 'air transport' (39.5%) and 'railway' (8.4%).

Activities

'Eat out at restaurants' (65.0%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (53.1%) and 'shopping for pleasure' (27.2%).

Travel party



'Alone' (36.3%) was the most common travel party amongst visitors to the region, followed by 'adult couple' (23.9%) and 'friends or relatives' (16.6%).

Expenditure (incl airfares and transport costs) (2)

Domestic overnight visitors spent over \$6.1 billion in the region - up by 10.9%* on YE Jun 13. On average, they spent \$260 per night - down by 2.3% on YE Jun 13.

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

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

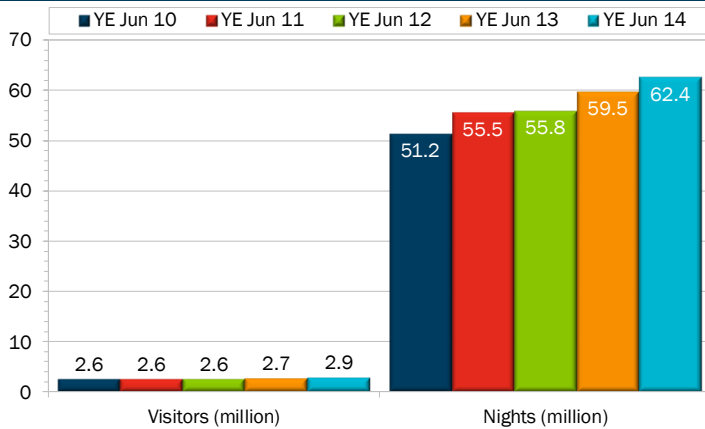
* The percentage change is statistically significant.

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

Total visitors (million)	32.5
Total nights (million)	86.1
Total expenditure (billion)	\$14.6

International Overnight Travel ⁽³⁾

Visitors and nights



Sydney received over 2.9 million international overnight visitors - up by 6.5%* on YE Jun 13. Visitors spent over 62.4 million nights in the region - up by 4.9% on YE Jun 13.

Note: The number of overnight trips to New South Wales by international visitors increased by 6.6 percent* on last year and by 14.0 percent* compared to four years ago.

Market share

The region received 93.6% of visitors and 83.4% of nights in NSW. Compared to YE Jun 13, the share of visitors was down by 0.1% pt and the share of nights was down by 1.4% pts.

Purpose of visit to the region

'Holiday / pleasure' (55.0%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (25.6%) and 'business' (12.8%). Compared to YE Jun 13, visitors who travelled for 'holiday / pleasure' grew by 7.9%* and 'VFR' increased by 11.3%* while 'business' grew by 2.3%.

Origin - share of visitors to the region

Share of international visitors to Sydney							
Rank	Market	YE Jun 13	YE Jun 14	Rank	Market	YE Jun 13	YE Jun 14
1	Mainland China & HK	16.9%	17.6%	12	France	2.4%	2.4%
	Mainland China	14.0%	14.3%	13	Taiwan	1.9%	1.9%
	Hong Kong	2.9%	3.3%	14	Indonesia	1.8%	1.9%
2	New Zealand	11.9%	11.6%	15	Scandinavia	1.9%	1.9%
3	United Kingdom	10.8%	10.6%	16	Italy	1.4%	1.4%
4	USA	10.1%	10.2%	17	Thailand	1.1%	1.1%
5	Korea	5.3%	4.9%	18	Switzerland	1.0%	1.0%
6	Japan	5.3%	4.8%	19	Middle East & Nth Africa	1.0%	1.0%
7	Singapore	3.5%	3.6%	20	Ireland	1.1%	0.9%
8	Germany	3.5%	3.5%	21	Netherlands	0.9%	0.8%
9	India	2.5%	2.8%		Other Asia	2.4%	2.7%
10	Canada	2.7%	2.6%		Other Europe	2.8%	2.8%
11	Malaysia	2.3%	2.5%		Other Countries	5.6%	5.4%

Accommodation

'Rented house / apartment / unit / flat' (42.9%) was the most popular form of accommodation used for nights in the region, followed by 'home of friend or relative' (30.6%) and 'backpacker / hostel' (6.1%).

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

International overnight visitors spent nearly \$6.2 billion in the region - up by 5.3% on YE Jun 13. On average, they spent \$99 per night - up by 0.4% on YE Jun 13.

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

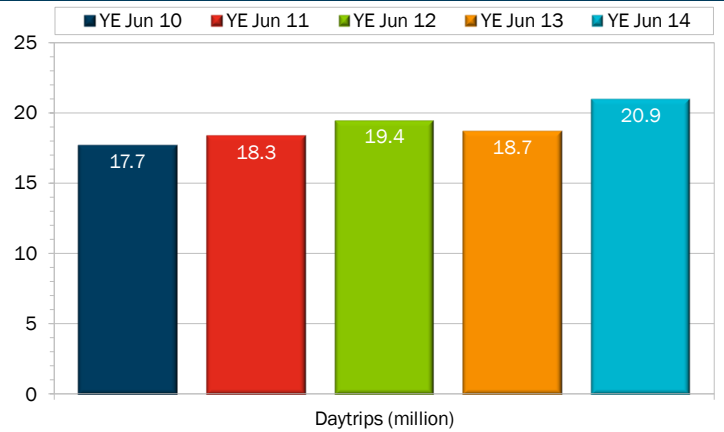
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel ⁽⁵⁾

Daytrips



Sydney received over 20.9 million domestic daytrip visitors - up by 11.9%* on YE Jun 13.

Note: The number of domestic daytrips to New South Wales increased by 2.4 percent on last year and by 5.3 percent* compared to four years ago.

Market share

The region received 39.6% of daytrips to NSW. Compared to YE Jun 13, the share was up by 3.3% pts.

Main purpose of trip

'Holiday or leisure' (45.5%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (30.8%) and 'business' (11.0%).

Compared to YE Jun 13, visitors who travelled for 'holiday or leisure' grew by 12.7%* and 'VFR' increased by 11.4%* while 'business' grew by 5.3%.

Activities

'Eat out at restaurants' (43.7%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (38.8%) and 'shopping for pleasure' (19.2%).

Expenditure ⁽⁶⁾

Domestic daytrip visitors spent nearly \$2.3 billion in the region - up by 10.4% on YE Jun 13. On average, they spent \$109 per trip - down by 1.3% on YE Jun 13.

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

Notes and further information

Due to changes to the National Visitor Survey (NVS) methodology, care should be taken when comparing year ending June 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.

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