Overview

This visitor profile provides a snapshot of visitation to Sydney CBD in the year ended (YE) December 2013. Sydney CBD in this paper consists of the following areas: Sydney, Haymarket and The Rocks.

On average, the total number\(^1\) of visitors to Sydney CBD is 10.6 million per annum. The number of visitors marginally decreased by 1% on average from YE December 2009 to YE December 2013.

In YE December 2013, the number of international and domestic overnight visitors to Sydney CBD was 5.5 million. Sydney CBD accounted for almost half (49%) of overnight visitors to the Sydney Tourism Region\(^2\).

The number of domestic day-trip visitors\(^3\) to Sydney CBD was 5.0 million, which was over a quarter (26%) of total domestic day-trip visitors to the Sydney Tourism Region.

International Visitors

- The average number of international visitors to Sydney CBD is 1.8 million per annum.
- In YE December 2013, Sydney CBD received 1.9 million international visitors (up 8% on the previous year). Those visitors stayed 24.2 million nights in the region (up 11% on the previous year) and spent approximately $2.4 billion (up 11% on the previous year).
- Over two thirds of international visitors to Sydney CBD (67%) came for holiday purposes, 14% came for business purposes while 13% came to visit friends and relatives.
- The top five international markets visiting Sydney CBD were: China (16%), USA (11%), United Kingdom (11%), New Zealand (9%) and Japan (6%). Of the top five source markets, China recorded the strongest growth rate, up 18% when compared to YE December 2012. China was the largest contributor to the total growth of international visitors to Sydney CBD.
- The most popular activities for international visitors to Australia who visited Sydney CBD were eating at restaurants and cafés (89%), shopping (78%) and sightseeing (76%).\(^4\)
- Nearly half (46%) of international visitors who visited Sydney CBD were unaccompanied travellers (a large proportion of them in their 20s), 23% travelled as an adult couple (a large proportion aged 55 and over) while 13% were friends and relatives travelling together (also in their 20’s).

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\(^1\) For the purposes of this document, the term ‘average’ refers to an annual average based on four years to the year ending December 2013.

\(^2\) Sydney Tourism Region (bordering towns): Palm Beach, Wisemans Ferry, Richmond, Penrith, Picton, Campbelltown and Waterfall.

\(^3\) Day-trip visitors (or same day visitors) are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home.

\(^4\) These were the most popular activities for international visitors to Australia who visited Sydney CBD; however they did not necessarily participate in these activities in Sydney CBD.
- The youth market (15-29 years) accounted for 32% of the total international visitors to Sydney CBD. The second largest age group was 30 to 39 year olds (19%).
- Over half (57%) of all international visitors to Sydney CBD were first time visitors to Australia.
- The most popular mode of transport generally used by international visitors to Sydney CBD was aircraft (35%), then taxi or chauffeur driven hire car (19%) and private or company car (14%).
- The majority (76%) of international visitors to Sydney CBD in YE December 2013 were fully independent travellers (non package - non group tour).

**Domestic Overnight Visitors**

- The average number of domestic overnight visitors to Sydney CBD is 3.6 million per annum. The number of visitors decreased on average by 1% per year from YE December 2009 to YE December 2013.
- In YE December 2013, Sydney CBD received 3.6 million domestic overnight visitors (up 3% on the previous year). Those visitors stayed 8 million nights in the region (down 4% on the previous year) and spent an estimated $2.2 billion, (up 5% on the previous year).
- Forty per cent of domestic overnight visitors to Sydney CBD came for holiday purposes, 35% came for business purposes and 20% came to visit their friends and relatives.
- The most popular activities for domestic overnight visitors to Sydney CBD were eating at restaurants (80%), visiting friends and relatives (36%), shopping (34%), general sightseeing (27%) and visiting pubs, clubs and discos (23%).
- The largest proportion of domestic overnight visitors to Sydney CBD came from within NSW (36%). One third (33%) were regional NSW residents (majority coming from the Hunter, North Coast, and South Coast) and 6% came from the Sydney tourism region. A quarter (26%) came from Victoria, 15% from Queensland and the remaining 23% came from other States/ Territories.
- Twenty-four per cent of domestic overnight visitors to Sydney CBD were youth (between 15 and 29 years of age). Visitors in their 30’s and 40’s were the other two largest age groups to the region (21% each).
- The largest travel groups to Sydney CBD were unaccompanied travellers (35%), then adult couples (23%) followed by families and friends travelling with children (13%).
- Air transport was the most popular mode of transport (58%), followed by private and company vehicle (32%) while railway was used by only 9% of domestic overnight visitors to Sydney CBD.
Domestic Day-trip Visitors

- The average number of domestic day-trip visitors to Sydney CBD is 5.2 million per annum. The number of visitors decreased on average by 1% per year from YE December 2009 to YE December 2013.

- In YE December 2013, there were 5 million domestic day-trip visitors to Sydney CBD (down 10% on the previous year). These visitors spent an estimated $559 million (down 10% on the previous year).

- Fifty-eight per cent of domestic day-trip visitors to Sydney CBD came for holiday purposes, 17% came to visit friends and relatives and 16% came for business purposes.

- Over half (51%) of domestic day-trip visitors to Sydney CBD came from Regional NSW (the largest proportion from the South Cost) while 42% came from the Sydney tourism region. The other 7% were interstate visitors.

- The top 3 activities for domestic day-trip visitors to Sydney CBD were: eating at restaurants and cafés (66%), shopping (29%) and visiting friends and relatives (27%).

- Over a third (35%) of domestic day-trip visitor to Sydney CBD were youth (between 15 to 29 years of age) then aged 60 and over (20%) followed by visitors in their 40’s (19%).

<table>
<thead>
<tr>
<th>Visitors to Sydney CBD – YE December 2013</th>
<th>Number of Visitors</th>
<th>Market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Visitors</td>
<td>1,900,000</td>
<td>18%</td>
</tr>
<tr>
<td>Domestic Overnight Visitors</td>
<td>3,600,000</td>
<td>34%</td>
</tr>
<tr>
<td>Domestic Day-trip Visitors</td>
<td>5,000,000</td>
<td>48%</td>
</tr>
<tr>
<td>TOTAL VISITORS</td>
<td>10,500,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: International and National Visitors Surveys (YE December 2013), Tourism Research Australia.