Travel to Sydney to Visit Friends and Relatives
Year ended December 2013

Domestic Overnight VFR Travel (1)

Sydney received over 3.1 million domestic overnight visitors who visited the region for the purpose of ‘visiting friends and relatives’ (VFR) - up by 3.8% on YE Dec 12. VFR visitors spent over 8.9 million nights in the region - down by 11.3% on YE Dec 12.

Market share
VFR travel represented 37.7% of visitors and 40.1% of nights in the region. Compared to YE Dec 12, the share of visitors was down by 1.2% pts and the share of nights was down by 6.1% pts.

The region received 33.5% of VFR visitors and 31.9% of VFR nights in NSW. Compared to YE Dec 12, the share of visitors was up by 1.4% pts and the share of nights was down by 1.6% pts.

Month returned from visit to Sydney
December (11.0%) was the most popular month for VFR visitors to visit Sydney, while February (6.1%) was the least popular.

More VFR nights in the region were spent in October (11.7%) than any other month, while August (6.1%) had the least nights.

Accommodation
‘Friends or relatives property’ (86.1%) was the most popular accommodation type used for VFR nights in the region.

All transport
‘Private or company vehicle’ (62.1%) was the most popular form of transport used by VFR visitors to the region, followed by ‘air transport’ (29.1%) and ‘railway’ (7.7%).

Expenditure (excl motor vehicles purchases etc) (2)
Domestic overnight VFR visitors spent $1.3 billion in Sydney - up by 1.1% on YE Dec 12. On average, visitors spent $145 per night in the region - up by 14.0% on YE Dec 12.

(2) Estimated using data from TRA’s modelled domestic overnight visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 13. Expenditure prorated based on the number of nights.

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, YE Dec 13, Tourism Research Australia (TRA)
Sydney received 708,100 international overnight VFR visitors - up by 6.7%* on YE Dec 12. VFR visitors spent over 14.5 million nights in the region – up by 5.9% on YE Dec 12.

Market share
VFR travel represented 25.1% of visitors and 23.6% of nights in the region. Compared to YE Dec 12, the share of visitors was up by 0.1% pt and the share of nights was down by 0.2 pts.

The region received 84.8% of VFR visitors and 83.1% of VFR nights in NSW. Compared to YE Dec 12, the share of visitors was up by 0.9% pts and the share of nights was up by 0.1% pt.

Seasonality
The December quarter (32.7%) had the highest proportion of VFR visitors who had visited the region, while the June quarter (20.5%) had the lowest.

Origin – share of visitors to Sydney

<table>
<thead>
<tr>
<th>Rank</th>
<th>Market</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
<th>YE Dec 12</th>
<th>YE Dec 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Zealand</td>
<td>19.4%</td>
<td>18.0%</td>
<td>22 Germany</td>
<td>1.8%</td>
</tr>
<tr>
<td>2</td>
<td>United Kingdom</td>
<td>14.1%</td>
<td>16.0%</td>
<td>13 Middle East &amp; North Africa</td>
<td>1.3%</td>
</tr>
<tr>
<td>3</td>
<td>Mainland China &amp; HK</td>
<td>11.9%</td>
<td>12.1%</td>
<td>14 Ireland</td>
<td>1.6%</td>
</tr>
<tr>
<td>4</td>
<td>Mainland China</td>
<td>8.2%</td>
<td>8.5%</td>
<td>15 France</td>
<td>1.4%</td>
</tr>
<tr>
<td>5</td>
<td>Hong Kong</td>
<td>3.7%</td>
<td>3.6%</td>
<td>18 Scandinavia</td>
<td>1.7%</td>
</tr>
<tr>
<td>6</td>
<td>USA</td>
<td>7.0%</td>
<td>7.9%</td>
<td>17 Thailand</td>
<td>1.4%</td>
</tr>
<tr>
<td>7</td>
<td>India</td>
<td>3.6%</td>
<td>3.7%</td>
<td>18 Italy</td>
<td>0.8%</td>
</tr>
<tr>
<td>8</td>
<td>Japan</td>
<td>3.0%</td>
<td>3.2%</td>
<td>21 Switzerland</td>
<td>0.8%</td>
</tr>
<tr>
<td>9</td>
<td>Canada</td>
<td>2.8%</td>
<td>2.9%</td>
<td>Other Asia</td>
<td>2.7%</td>
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<tr>
<td>10</td>
<td>Indonesia</td>
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<td>Other Europe</td>
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</tr>
<tr>
<td>11</td>
<td>Malaysia</td>
<td>2.6%</td>
<td>2.3%</td>
<td>Other Countries</td>
<td>8.5%</td>
</tr>
</tbody>
</table>

Accommodation
‘Home of friend or relative’ (88.0%) was the most popular accommodation type used for VFR nights in the region, followed by ‘rented house / apartment / unit / flat’ (5.4%).

Expenditure (incl pre-paid package expenditure)
International overnight VFR visitors spent $841 million in Sydney - up by 5.0% on YE Dec 12. On average, visitors spent $58 per night in the region - down by 0.8% on YE Dec 12.

Expenditure (excl motor vehicles purchases etc) (6)
Domestic daytrip VFR visitors spent $376 million in Sydney - down by 9.8% on YE Dec 12. On average, they spent $62 per trip to the region - down by 6.9% on YE Dec 12.

(6) Estimated using data from TRA’s modelled domestic day visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 13. Expenditure prorated based on the number of visitors.

Further information
Please see www.destinationnsw.com.au for profiles on travel to other regions in NSW and information on international and domestic travel to the State.