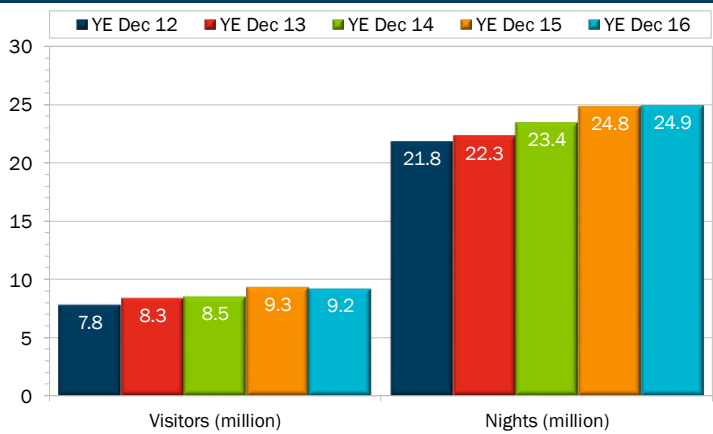


Domestic Overnight Travel¹

Visitors and nights



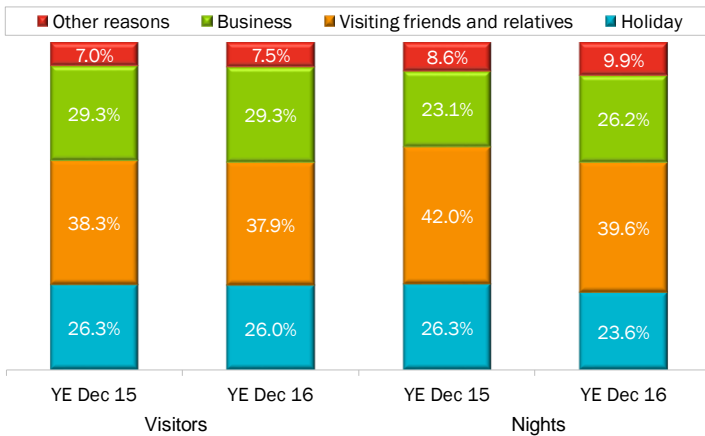
Sydney received nearly 9.2 million domestic overnight visitors - down by 1.5% on YE Dec 15. Visitors spent nearly 24.9 million nights in Sydney - up by 0.3% on YE Dec 15.

Note: The number of domestic overnight trips to New South Wales increased by 4.3 percent* on last year and by 18.2 percent* compared to four years ago.

Market share

Sydney received 31.3% of visitors and 26.0% of nights in NSW. Compared to YE Dec 15, the share of visitors was down by 1.9% pts and the share of nights was down by 1.2% pts.

Purpose of visit to Sydney



'Visiting friends and relatives (VFR)' (37.9%) was the largest purpose of visit for visitors to Sydney, followed by 'business' (29.3%) and 'holiday' (26.0%). Compared to YE Dec 15, visitors who travelled for 'VFR' declined by 2.5% and 'business' decreased by 1.5% while 'holiday' fell by 2.4%.

'VFR' (39.6%) was the largest purpose in terms of nights in Sydney, followed by 'business' (26.2%) and 'holiday' (23.6%). Compared to YE Dec 15, nights spent for 'VFR' declined by 5.5% while 'business' grew by 14.0% and 'holiday' decreased by 9.8%.

Accommodation in Sydney

'Friends or relatives property' (46.8%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (16.0%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (14.2%) and 'rented house, apartment, flat or unit' (5.7%).

Origin

Origin	Visitors		Nights		Average length of stay in Sydney
	('000)	%	('000)	%	
Regional NSW	3,849	42.0%	8,851	35.6%	2.3
Sydney	792	8.6%	1,536	6.2%	1.9
Total intrastate	4,641	50.6%	10,387	41.8%	2.2
Victoria	1,647	17.9%	4,292	17.3%	2.6
Queensland	1,436	15.6%	5,490	22.1%	3.8
ACT	583	6.4%	1,286	5.2%	2.2
Other interstate	869	9.5%	3,401	13.7%	3.9
Total interstate	4,535	49.4%	14,469	58.2%	3.2
Total Sydney	9,176		24,856		2.7

Regional NSW (3.8 million or 42.0%) was the largest source of visitors to Sydney, followed by Victoria (1.6 million or 17.9%) and Queensland (1.4 million or 15.6%). Compared to YE Dec 15, the regional NSW source market declined by 1.1% and Victoria decreased by 2.6% while Queensland grew by 6.2%.

Regional NSW (8.9 million or 35.6%) was the largest source market in terms of nights in Sydney, followed by Queensland (5.5 million or 22.1%) and Victoria (4.3 million or 17.3%). Compared to YE Dec 15, nights spent by visitors from regional NSW declined by 5.0% while nights by Queenslanders grew by 29.6%* and Victorian nights decreased by 11.0%.

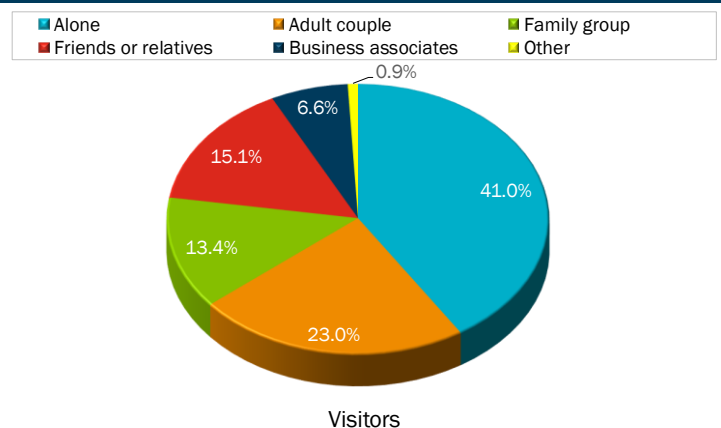
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (66.8%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (50.3%) and 'go shopping for pleasure' (22.5%).

Age groups

'15 to 29 years' (21.2%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (19.3%) and '50 to 59 years' (18.7%).

Travel party



'Alone' (41.0%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (23.0%) and 'friends or relatives' (15.1%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent nearly \$6.5 billion in Sydney - down by 4.3% on YE Dec 15. On average, they spent \$261 per night - down by 4.6% on YE Dec 15.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Dec 16.

Travel to Sydney

Year ended December 2016

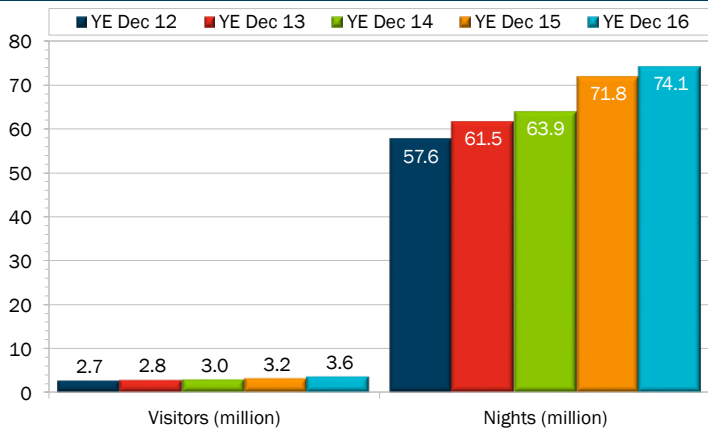
For the period of January 2016 to December 2016

Sources: (1) NVS & (2) IVS, YE Dec 16, TRA - unless otherwise specified.

	YE Dec 15	YE Dec 16	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	33.1	33.2	0.3%	10.9%	27.6%	61.5%
Total nights (million)	96.6	99.0	2.5%	74.9%	25.1%	0.0%
Total spend (billion)	\$16.5	\$17.3	5.1%	49.9%	37.4%	12.6%

International Overnight Travel²

Visitors and nights



Sydney received over 3.6 million international overnight visitors - up by 13.3%* on YE Dec 15. Visitors spent over 74.1 million nights in Sydney - up by 3.2% on YE Dec 15.

Note: The number of overnight trips to New South Wales by international visitors increased by 13.2 percent* on last year and by 36.2 percent* compared to four years ago.

Market share

Sydney received 93.5% of visitors and 84.7% of nights in NSW. Compared to YE Dec 15, the share of visitors was up by 0.1% pt and the share of nights was up by 1.0% pt.

Purpose of visit to Sydney

'Holiday' (58.0%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (23.6%) and 'business' (10.3%). Compared to YE Dec 15, visitors who travelled for 'holiday' grew by 15.7%* and 'VFR' increased by 7.8%* while 'business' grew by 5.4%.

Origin to Sydney

Rank	Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in Sydney (\$ million)	Average spend per night in Sydney	Average length of stay in Sydney
1	Mainland China	666	18.4%	15,908	2,613	164	23.9
2	USA	398	11.0%	3,968	651	164	10.0
3	New Zealand	368	10.2%	3,373	420	125	9.2
4	United Kingdom	340	9.4%	6,270	644	103	18.5
5	South Korea	201	5.5%	5,388	604	112	26.8
6	Japan	157	4.3%	2,525	313	124	16.1
7	India	123	3.4%	4,752	294	62	38.5
8	Germany	121	3.3%	2,035	184	90	16.8
9	Singapore	117	3.2%	1,398	250	179	11.9
10	Hong Kong	113	3.1%	2,180	300	137	19.3
	Other markets	1,015	28.0%	26,318	2,372	90	25.9
	Total Sydney	3,620		74,115	8,645	117	20.5

Accommodation in Sydney

'Rented house, apartment, flat or unit' (45.4%) was the most popular form of accommodation used for nights in Sydney, followed by 'friends or relatives property' (27.4%) and 'standard hotel or motor inn, below 4 star' (4.6%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent over \$8.6 billion in Sydney - up by 14.7%* on YE Dec 15. On average, they spent \$117 per night - up by 11.2% on YE Dec 15.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Dec 16.

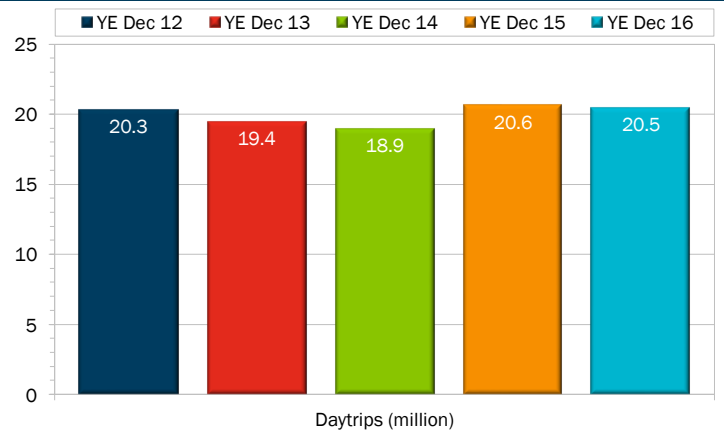
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel¹

Daytrips



Sydney received nearly 20.5 million domestic daytrip visitors - down by 0.9% on YE Dec 15.

Note: The number of domestic daytrips to New South Wales increased by 4.1 percent* on last year and by 5.0 percent* compared to four years ago.

Market share

Sydney received 35.5% of daytrips to NSW. Compared to YE Dec 15, the share was down by 1.7% pts.

Main purpose of trip

'Holiday' (43.6%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (30.4%) and 'business' (12.9%).

Compared to YE Dec 15, visitors who travelled for 'holiday' grew by 8.5%* while 'VFR' declined by 12.9%* and 'business' increased by 15.6%*.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (50.1%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (36.6%) and 'go shopping for pleasure' (15.8%).

Expenditure³

Domestic daytrip visitors spent nearly \$2.2 billion in Sydney - up by 1.2% on YE Dec 15. On average, they spent \$107 per trip - up by 2.1% on YE Dec 15.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Dec 16.

Forecast⁵

Domestic visitor nights in Sydney are expected to increase from over 24.9 million in 2014/15 to nearly 31.0 million in 2024/25, an average annual growth rate of 2.2%.

International visitor nights in Sydney are expected to increase from over 67.3 million in 2014/15 to over 115.1 million in 2024/25, an average annual growth rate of 5.5%.

(5) Source: State and Territory Tourism Forecasts, 2016, TRA. Note: nights only.

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.