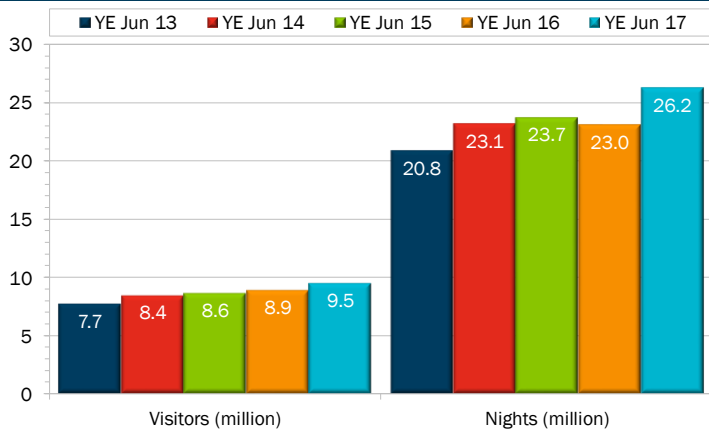


Domestic Overnight Travel¹

Visitors and nights



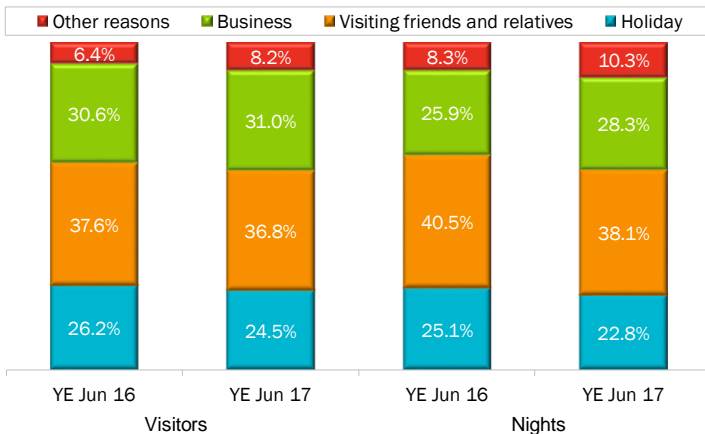
Sydney received nearly 9.5 million domestic overnight visitors - up by 6.5%* on YE Jun 16. Visitors spent over 26.2 million nights in Sydney - up by 13.9%* on YE Jun 16.

Note: The number of domestic overnight trips to New South Wales increased by 5.6 percent* on last year and by 20.4 percent* compared to four years ago.

Market share

Sydney received 31.4% of visitors and 27.1% of nights in NSW. Compared to YE Jun 16, the share of visitors was up by 0.3% pts and the share of nights was up by 1.9% pts.

Purpose of visit to Sydney



'Visiting friends and relatives' (VFR) (36.8%) was the largest purpose of visit for visitors to Sydney, followed by 'business' (31.0%) and 'holiday' (24.5%). Compared to YE Jun 16, visitors who travelled for 'VFR' grew by 4.1% and 'business' increased by 8.0%* while 'holiday' was down marginally.

'VFR' (38.1%) was the largest purpose in terms of nights in Sydney, followed by 'business' (28.3%) and 'holiday' (22.8%). Compared to YE Jun 16, nights spent for 'VFR' grew by 7.1% and 'business' increased by 24.1%* while 'holiday' grew by 3.7%.

Accommodation in Sydney

'Friends or relatives property' (45.7%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (15.4%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (14.4%) and 'rented house, apartment, flat or unit' (6.0%).

Origin

Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in Sydney (\$ million)	Average spend per night in Sydney	Average length of stay in Sydney
Regional NSW	3,980	42.1%	8,939	1,602	179	2.2
Sydney	838	8.9%	1,760	1,485	844	2.1
Total intrastate	4,818	50.9%	10,699	3,088	289	2.2
Victoria	1,791	18.9%	4,995	1,255	251	2.8
Queensland	1,420	15.0%	5,473	1,112	203	3.9
ACT	573	6.1%	1,544	280	181	2.7
Other interstate	855	9.0%	3,505	949	271	4.1
Total interstate	4,638	49.1%	15,516	3,596	232	3.3
Total Sydney	9,456		26,215	6,684	255	2.8

Regional NSW (4.0 million or 42.1%) was the largest source of visitors to Sydney, followed by Victoria (1.8 million or 18.9%) and Queensland (1.4 million or 15.0%). Compared to YE Jun 16, the regional NSW source market grew by 8.5%* and Victoria increased by 7.8% while Queensland grew by 8.0%.

Regional NSW (8.9 million or 34.1%) was the largest source market in terms of nights in Sydney, followed by Queensland (5.5 million or 20.9%) and Victoria (5.0 million or 19.1%). Compared to YE Jun 16, nights spent by visitors from regional NSW grew by 7.5% and nights by Queenslanders increased by 28.4%* while Victorian nights grew by 11.5%.

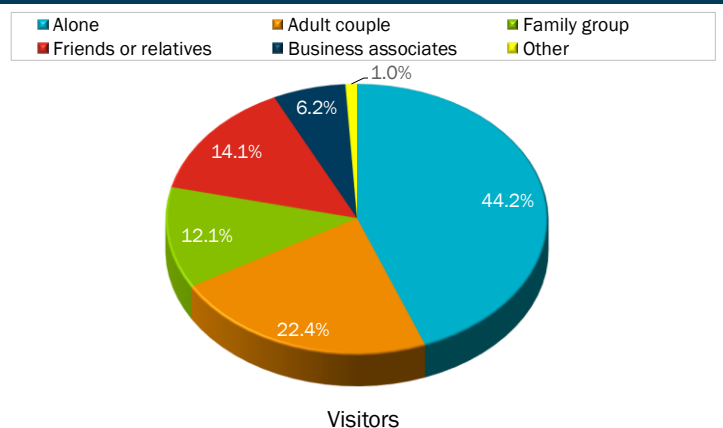
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (68.3%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (49.0%) and 'go shopping for pleasure' (22.1%).

Age groups

'15 to 29 years' (21.1%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (19.7%) and '50 to 59 years' (18.6%).

Travel party



'Alone' (44.2%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (22.4%) and 'friends or relatives' (14.1%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent nearly \$6.7 billion in Sydney - up by 4.4% on YE Jun 16. On average, they spent \$255 per night - down by 8.4% on YE Jun 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Jun 17.

Travel to Sydney

Year ended June 2017

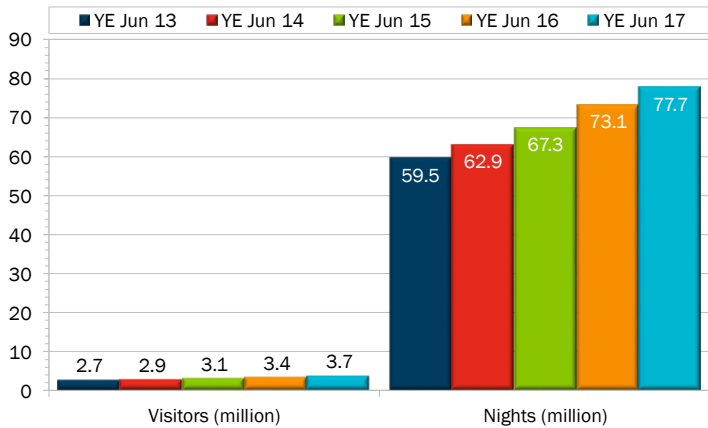
For the period of July 2016 to June 2017

Sources: (1) NVS & (2) IVS, YE Jun 17, TRA - unless otherwise specified.

	YE Jun 16	YE Jun 17	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	32.8	32.9	0.4%	11.4%	28.8%	59.9%
Total nights (million)	96.1	103.9	8.1%	74.8%	25.2%	0.0%
Total spend (billion)	\$16.8	\$17.9	6.6%	50.5%	37.4%	12.1%

International Overnight Travel²

Visitors and nights



Sydney received over 3.7 million international overnight visitors - up by 9.8%* on YE Jun 16. Visitors spent over 77.7 million nights in Sydney - up by 6.3%* on YE Jun 16.

Note: The number of overnight trips to New South Wales by international visitors increased by 9.9 percent* on last year and by 37.4 percent* compared to four years ago.

Market share

Sydney received 93.5% of visitors and 84.0% of nights in NSW. Compared to YE Jun 16, the share of visitors was down by 0.1 pt and the share of nights was down by 0.2 pts.

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)' (23.3%) and 'business' (10.6%). Compared to YE Jun 16, visitors who travelled for 'holiday' grew by 10.3%* and 'VFR' increased by 5.9%* while 'business' grew by 9.4%*.

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	695	18.6%	18,276	2,878	157	26.3
2	USA	416	11.1%	4,256	684	161	10.2
3	New Zealand	364	9.7%	2,971	392	132	8.2
4	United Kingdom	348	9.3%	6,444	656	102	18.5
5	South Korea	209	5.6%	4,527	549	121	21.7
6	Japan	159	4.2%	2,742	311	113	17.2
7	India	128	3.4%	4,985	318	64	38.8
8	Germany	126	3.4%	1,748	167	95	13.9
9	Hong Kong	119	3.2%	2,012	291	144	16.9
10	Singapore	112	3.0%	1,262	246	195	11.3
	Other markets	1,070	28.6%	28,483	2,542	89	26.6
	Total Sydney	3,747		77,707	9,034	116	20.7

Accommodation in Sydney

'Rented house, apartment, flat or unit' (44.0%) was the most popular form of accommodation used for nights in Sydney, followed by 'friends or relatives property' (29.2%) and 'standard hotel or motor inn, below 4 star' (4.5%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent over \$9.0 billion in Sydney - up by 10.1%* on YE Jun 16. On average, they spent \$116 per night - up by 3.6% on YE Jun 16.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Jun 17.

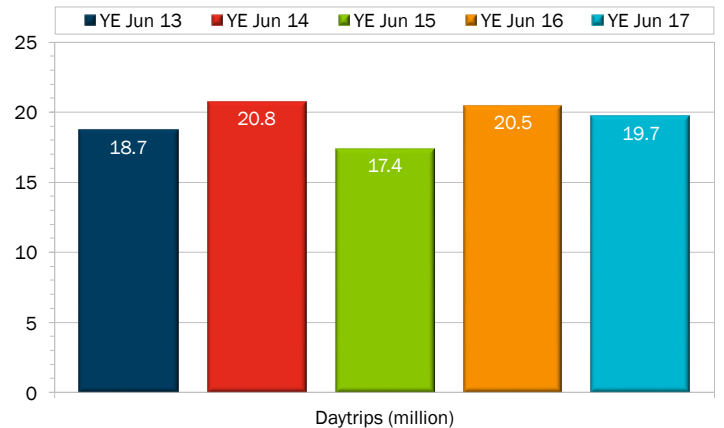
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Sydney received nearly 19.7 million domestic daytrip visitors - down by 3.8% on YE Jun 16.

Note: The number of domestic daytrips to New South Wales decreased by 0.1 percent on last year, but was up by 10.0 percent* compared to four years ago.

Market share

Sydney received 34.7% of daytrips to NSW. Compared to YE Jun 16, the share was down by 1.4% pts.

Main purpose of trip

'Holiday' (42.9%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (31.8%) and 'business' (12.0%).

Compared to YE Jun 16, visitors who travelled for 'holiday' declined by 9.9%* while 'VFR' grew by 2.9% and 'business' decreased by 10.2%.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (48.5%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (37.1%) and 'go shopping for pleasure' (16.2%).

Expenditure³

Domestic daytrip visitors spent nearly \$2.2 billion in Sydney - down by 0.2% on YE Jun 16. On average, they spent \$110 per trip - up by 3.8% on YE Jun 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Jun 17.

Forecast⁵

Domestic visitor nights in Sydney are expected to increase from over 26.8 million in 2016/17 to over 33.4 million in 2026/27, an average annual growth rate of 2.2%.

International visitor nights in Sydney are expected to increase from nearly 76.3 million in 2016/17 to over 137.3 million in 2026/27, an average annual growth rate of 6.1%.

(5) Source: State and Territory Tourism Forecasts, 2017, 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.