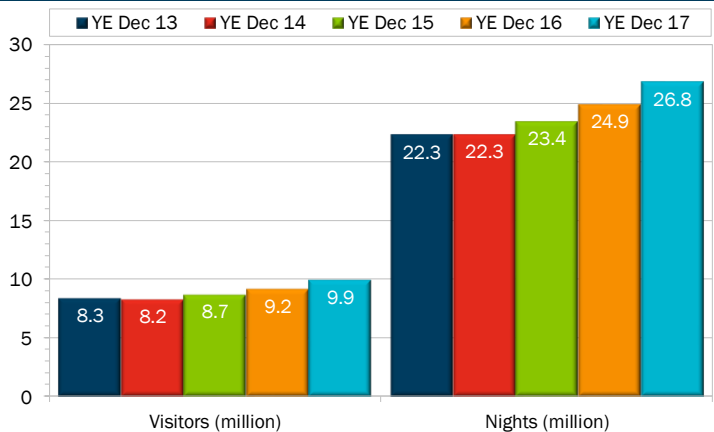


Domestic Overnight Travel¹

Visitors and nights



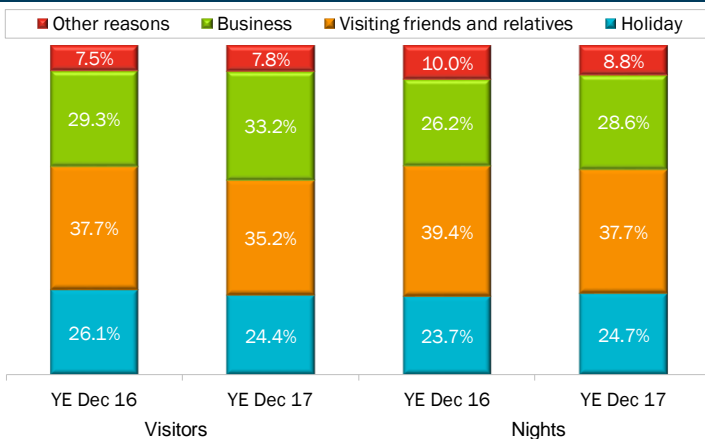
Sydney received over 9.9 million domestic overnight visitors - up by 8.4%* on YE Dec 16. Visitors spent nearly 26.8 million nights in Sydney - up by 7.7%* on YE Dec 16.

Note: The number of domestic overnight trips to New South Wales increased by 8.2 percent* on last year and by 22.8 percent* compared to four years ago.

Market share

Sydney received 31.4% of visitors and 26.8% of nights in NSW. Compared to YE Dec 16, the share of visitors was unchanged and the share of nights was up by 0.7% pts.

Purpose of visit to Sydney



'Visiting friends and relatives (VFR)' (35.2%) was the largest purpose of visit for visitors to Sydney, followed by 'business' (33.2%) and 'holiday' (24.4%). Compared to YE Dec 16, visitors who travelled for 'VFR' grew by 1.2% and 'business' increased by 22.8%* while 'holiday' grew by 1.5%.

'VFR' (37.7%) was the largest purpose in terms of nights in Sydney, followed by 'business' (28.6%) and 'holiday' (24.7%). Compared to YE Dec 16, nights spent for 'VFR' grew by 2.9% and 'business' increased by 17.6%* while 'holiday' grew by 12.3%.

Accommodation in Sydney

'Friends or relatives property' (45.0%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (17.2%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (14.8%) and 'rented house, apartment, flat or unit' (6.1%).

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	3,905	39.3%	8,407	1,663	198	2.2
Sydney	933	9.4%	2,118	1,604	757	2.3
Total intrastate	4,838	48.7%	10,525	3,267	310	2.2
Victoria	2,043	20.6%	5,760	1,523	264	2.8
Queensland	1,479	14.9%	5,155	1,144	222	3.5
ACT	649	6.5%	1,732	328	189	2.7
Other interstate	915	9.2%	3,606	1,035	287	3.9
Total interstate	5,086	51.3%	16,253	4,029	248	3.2
Total Sydney	9,924		26,778	7,296	272	2.7

Regional NSW (3.9 million or 39.3%) was the largest source of visitors to Sydney, followed by Victoria (2.0 million or 20.6%) and Queensland (1.5 million or 14.9%). Compared to YE Dec 16, the regional NSW source market grew by 1.9% and Victoria increased by 23.8%* while Queensland grew by 3.3%.

Regional NSW (8.4 million or 31.4%) was the largest source market in terms of nights in Sydney, followed by Victoria (5.8 million or 21.5%) and Queensland (5.2 million or 19.2%). Compared to YE Dec 16, nights spent by visitors from regional NSW declined by 5.2% while Victorian nights grew by 34.2%* and nights by Queenslanders decreased by 6.0%.

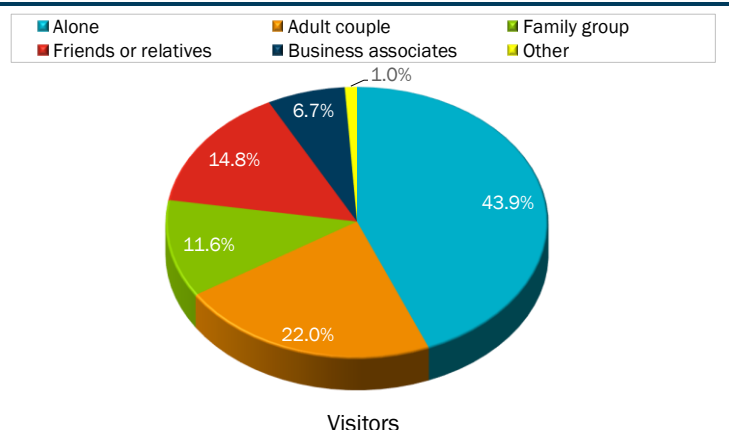
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (70.2%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (47.6%) and 'go shopping for pleasure' (21.0%).

Age groups

'15 to 29 years' (21.3%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (20.4%) and '50 to 59 years' (18.3%).

Travel party



'Alone' (43.9%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (22.0%) and 'friends or relatives' (14.8%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent almost \$7.3 billion in Sydney - up by 12.4%* on YE Dec 16. On average, they spent \$272 per night - up by 4.4% on YE Dec 16.

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

Travel to Sydney

Year ended December 2017

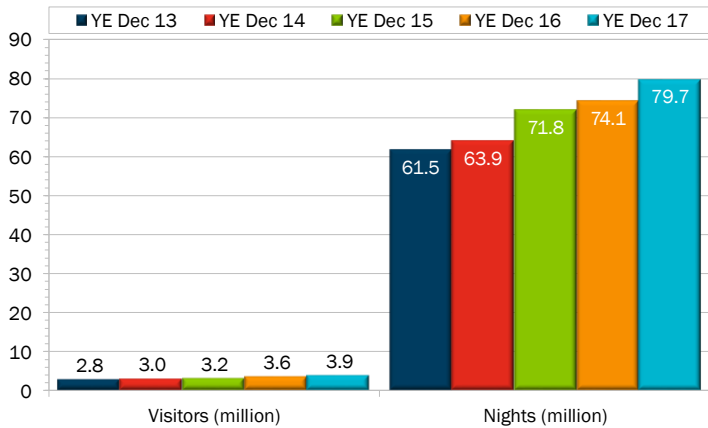
For the period of January 2017 to December 2017

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

	YE Dec 16	YE Dec 17	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	33.2	34.0	2.6%	11.4%	29.2%	59.4%
Total nights (million)	99.0	106.4	7.5%	74.8%	25.2%	0.0%
Total spend (billion)	\$17.3	\$18.9	9.0%	49.7%	38.7%	11.6%

International Overnight Travel²

Visitors and nights



Sydney received nearly 3.9 million international overnight visitors - up by 7.3%* on YE Dec 16. Visitors spent nearly 79.7 million nights in Sydney - up by 7.5%* on YE Dec 16.

Note: The number of overnight trips to New South Wales by international visitors increased by 7.4 percent* on last year and by 38.3 percent* compared to four years ago.

Market share

Sydney received 93.4% of visitors and 84.4% of nights in NSW. Compared to YE Dec 16, the share of visitors was down by 0.1 pt and the share of nights was down by 0.3 pts.

Purpose of visit to Sydney

'Holiday' (57.6%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (24.3%) and 'business' (11.3%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 6.4%* and 'VFR' increased by 10.5%* while 'business' grew by 18.2%*.

Origin to Sydney

Rank	Origin	Visitors ('000)	Visitors %	Visitor nights ('000)	Spend in Sydney (\$ million)	Average spend per night in Sydney	Average length of stay in Sydney
1	Mainland China	758	19.5%	18,479	3,075	166	24.4
2	USA	428	11.0%	3,965	674	170	9.3
3	New Zealand	355	9.1%	2,472	377	153	7.0
4	United Kingdom	345	8.9%	6,089	617	101	17.6
5	South Korea	220	5.7%	4,556	563	124	20.7
6	Japan	160	4.1%	2,929	328	112	18.3
7	India	139	3.6%	5,150	301	58	37.0
8	Hong Kong	126	3.2%	2,165	306	141	17.2
9	Germany	121	3.1%	1,775	168	94	14.7
10	Singapore	109	2.8%	1,017	234	230	9.4
	Other markets	1,125	29.0%	31,074	2,734	88	27.6
	Total Sydney	3,884		79,670	9,378	118	20.5

Accommodation in Sydney

'Rented house, apartment, flat or unit' (43.9%) was the most popular form of accommodation used for nights in Sydney, followed by 'friends or relatives property' (30.3%) and 'standard hotel or motor inn, below 4 star' (4.7%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent nearly \$9.4 billion in Sydney - up by 8.5%* on YE Dec 16. On average, they spent \$118 per night - up by 1.0% on YE Dec 16.

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

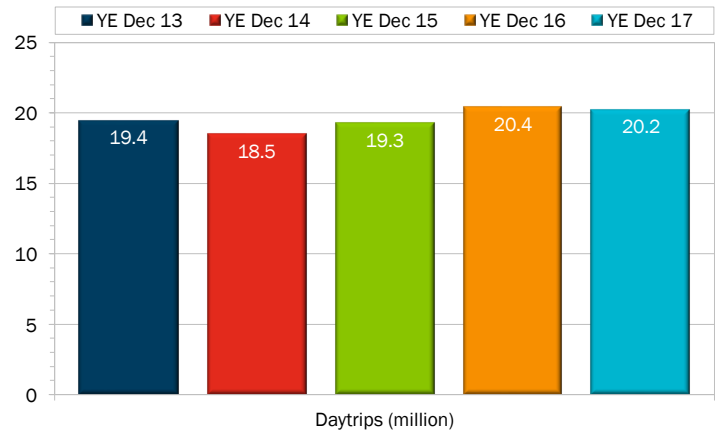
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Sydney received nearly 20.2 million domestic daytrip visitors - down by 0.9% on YE Dec 16.

Note: The number of domestic daytrips to New South Wales increased by 0.6 percent on last year and was up by 11.5 percent* compared to four years ago.

Market share

Sydney received 34.9% of daytrips to NSW. Compared to YE Dec 16, the share was down by 0.5% pts.

Main purpose of trip

'Holiday' (44.0%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (32.5%) and 'business' (11.3%).

Compared to YE Dec 16, visitors who travelled for 'holiday' declined by 0.1% while 'VFR' grew by 5.4% and 'business' decreased by 12.6%.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (50.3%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (38.2%) and 'go shopping for pleasure' (17.1%).

Expenditure³

Domestic daytrip visitors spent nearly \$2.2 billion in Sydney - up by 0.3% on YE Dec 16. On average, they spent \$108 per trip - up by 1.2% on YE Dec 16.

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