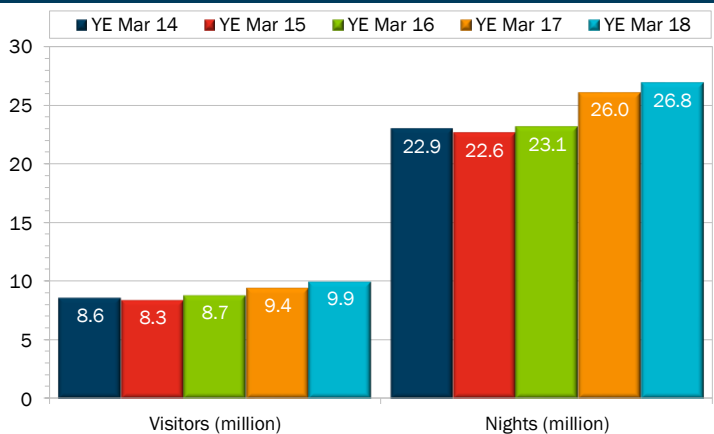


## Domestic Overnight Travel<sup>1</sup>

### Visitors and nights



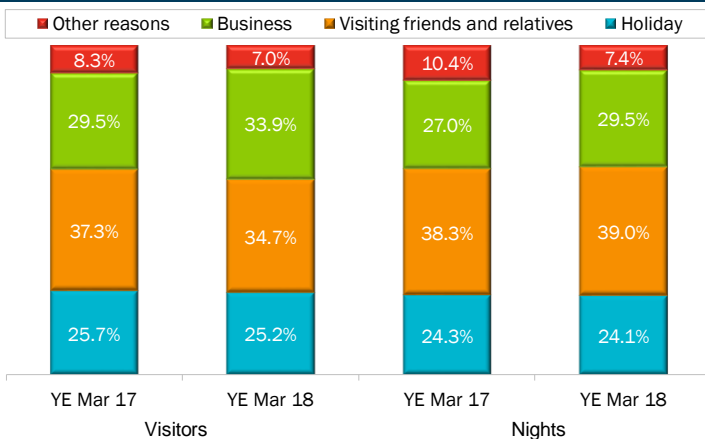
Sydney received over 9.9 million domestic overnight visitors - up by 5.8%\* on YE Mar 17. Visitors spent over 26.8 million nights in Sydney - up by 3.1% on YE Mar 17.

Note: The number of domestic overnight trips to New South Wales increased by 9.8 percent\* on last year and by 24.1 percent\* compared to four years ago.

### Market share

Sydney received 30.8% of visitors and 26.5% of nights in NSW. Compared to YE Mar 17, the share of visitors was down by 1.2% pts and the share of nights was down by 0.5% pts.

### Purpose of visit to Sydney



'Visiting friends and relatives (VFR)' (34.7%) was the largest purpose of visit for visitors to Sydney, followed by 'business' (33.9%) and 'holiday' (25.2%). Compared to YE Mar 17, visitors who travelled for 'VFR' declined by 1.7% while 'business' grew by 21.7%\* and 'holiday' increased by 3.9%.

'VFR' (39.0%) was the largest purpose in terms of nights in Sydney, followed by 'business' (29.5%) and 'holiday' (24.1%). Compared to YE Mar 17, nights spent for 'VFR' grew by 5.0% and 'business' increased by 12.3% while 'holiday' grew by 2.4%.

### Accommodation in Sydney

'Friends or relatives property' (46.3%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (18.2%) was the 2<sup>nd</sup> most popular, followed by 'standard hotel or motor inn, below 4 star' (14.1%) and 'rented house, apartment, flat or unit' (6.2%).

### 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	3,779	38.0%	8,373	1,671	200	2.2
Sydney	924	9.3%	1,855	1,618	872	2.0
Total intrastate	4,703	47.3%	10,227	3,289	322	2.2
Victoria	2,070	20.8%	5,967	1,608	269	2.9
Queensland	1,565	15.7%	5,330	1,189	223	3.4
ACT	673	6.8%	1,788	347	194	2.7
Other interstate	933	9.4%	3,519	947	269	3.8
Total interstate	5,241	52.7%	16,605	4,091	246	3.2
Total Sydney	9,944		26,832	7,380	275	2.7

Regional NSW (3.8 million or 38.0%) was the largest source of visitors to Sydney, followed by Victoria (2.1 million or 20.8%) and Queensland (1.6 million or 15.7%). Compared to YE Mar 17, the regional NSW source market declined by 7.9%\* while Victoria grew by 21.5%\* and Queensland increased by 10.3%.

Regional NSW (8.4 million or 31.2%) was the largest source market in terms of nights in Sydney, followed by Victoria (6.0 million or 22.2%) and Queensland (5.3 million or 19.9%). Compared to YE Mar 17, nights spent by visitors from regional NSW declined by 9.2% while Victorian nights grew by 27.6%\* and nights by Queenslanders decreased by 6.8%.

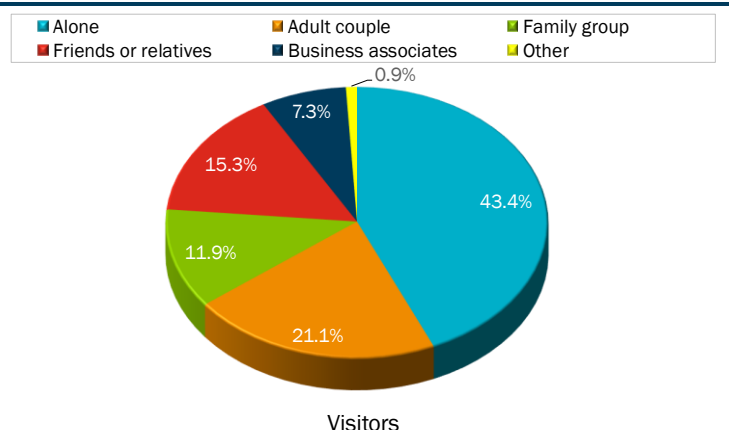
### Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (69.7%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (47.1%) and 'sightseeing or looking around' (21.4%).

### Age groups

'15 to 29 years' (21.4%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (20.7%) and '50 to 59 years' (18.3%).

### Travel party



'Alone' (43.4%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (21.1%) and 'friends or relatives' (15.3%).

### Expenditure (incl airfares and transport costs)<sup>3</sup>

Domestic overnight visitors spent nearly \$7.4 billion in Sydney - up by 13.1%\* on YE Mar 17. On average, they spent \$275 per night - up by 9.7% on YE Mar 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 18.

# Travel to Sydney

Year ended March 2018

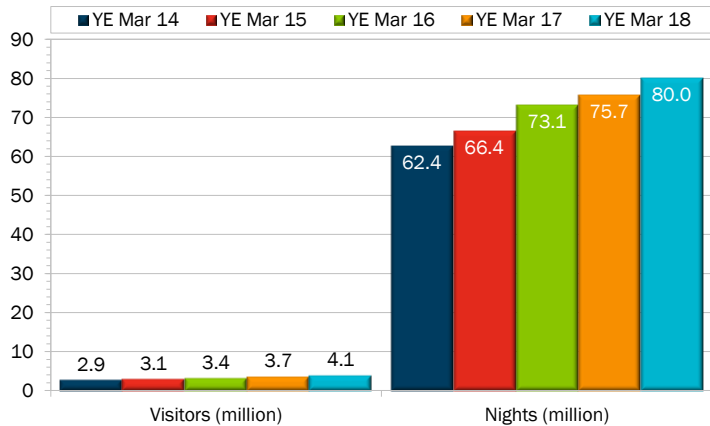
For the period of April 2017 to March 2018

Sources: (1) NVS & (2) IVS, YE Mar 18, TRA - unless otherwise specified.

Preliminary	YE Mar 17	YE Mar 18	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	32.7	34.8	6.5%	11.7%	28.6%	59.7%
Total nights (million)	101.7	106.8	5.0%	74.9%	25.1%	0.0%
Total spend (billion)	\$17.4	\$19.1	9.3%	49.6%	38.7%	11.6%

## International Overnight Travel<sup>2</sup> - preliminary

### Visitors and nights



Sydney received nearly 4.1 million international overnight visitors - up by 8.4%\* on YE Mar 17. Visitors spent nearly 80.0 million nights in Sydney - up by 5.6%\* on YE Mar 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 8.5 percent\* on last year and by 38.7 percent\* compared to four years ago.

### Market share

Sydney received 93.6% of visitors and 84.6% of nights in NSW. Compared to YE Mar 17, the share of visitors was down by 0.1% pt and the share of nights was up by 0.4% pts.

### 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	777	19.1%	18,172	3,095	170	23.4
2	USA	463	11.4%	3,736	659	177	8.1
3	New Zealand	378	9.3%	2,530	372	147	6.7
4	United Kingdom	350	8.6%	5,853	588	100	16.7
5	South Korea	221	5.4%	5,190	604	116	23.5
6	Japan	164	4.0%	2,961	334	113	18.1
7	India	150	3.7%	5,296	323	61	35.3
8	Hong Kong	131	3.2%	2,332	318	136	17.7
9	Germany	125	3.1%	1,939	179	92	15.5
10	Singapore	112	2.8%	1,041	231	222	9.3
	Other markets	1,190	29.3%	30,918	2,759	89	26.0
	Total Sydney	4,062		79,968	9,461	118	19.7

### Accommodation in Sydney

'Rented house, apartment, flat or unit' (44.7%) was the most popular form of accommodation used for nights in Sydney, followed by 'friends or relatives property' (29.8%) and 'standard hotel or motor inn, below 4 star' (4.7%).

### Expenditure (incl 30% prepaid package expenditure)<sup>4</sup>

International overnight visitors spent nearly \$9.5 billion in Sydney - up by 6.7%\* on YE Mar 17. On average, they spent \$118 per night - up by 1.1% on YE Mar 17.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Mar 18.

### Preliminary IVS results

Due to quality issues with the incoming passenger data, IVS results for the YE Mar 18 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

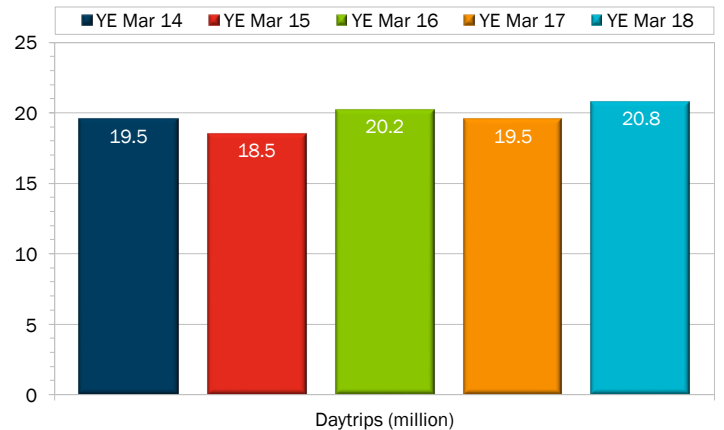
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Mar 18 are preliminary.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

## Domestic Daytrip Travel<sup>4</sup>

### Daytrips



Sydney received nearly 20.8 million domestic daytrip visitors - up by 6.5%\* on YE Mar 17.

Note: The number of domestic daytrips to New South Wales increased by 5.4 percent\* on last year and was up by 14.9 percent\* compared to four years ago.

### Market share

Sydney received 35.2% of daytrips to NSW. Compared to YE Mar 17, the share was up by 0.3% pts.

### Main purpose of trip

'Holiday' (45.1%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (31.5%) and 'business' (11.5%).

Compared to YE Mar 17, visitors who travelled for 'holiday' grew by 13.2%\* and 'VFR' increased by 6.0% while 'business' declined by 3.8%.

### 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' (37.1%) and 'go shopping for pleasure' (15.8%).

### Expenditure<sup>3</sup>

Domestic daytrip visitors spent over \$2.2 billion in Sydney - up by 8.6% on YE Mar 17. On average, they spent \$107 per trip - up by 2.0% on YE Mar 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 18.

### Forecast<sup>5</sup>

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](http://www.destinationnsw.com.au) for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.