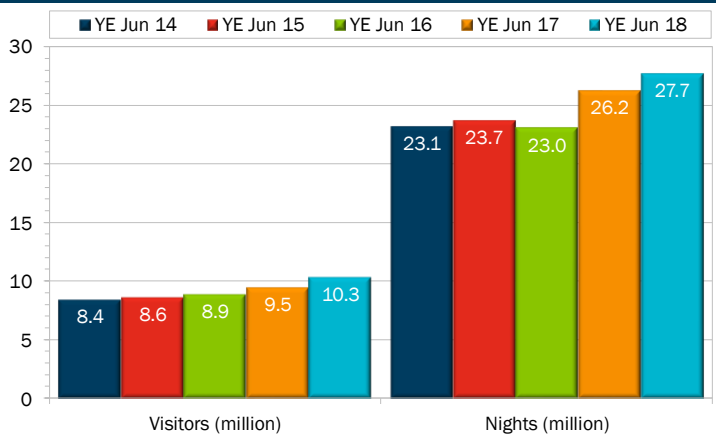


Domestic Overnight Travel¹

Visitors and nights



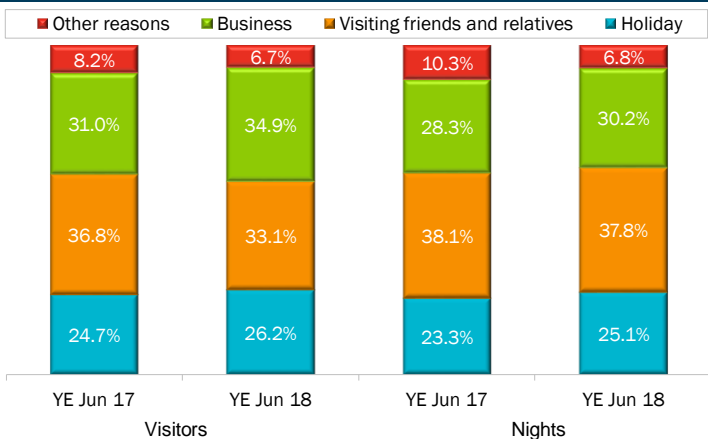
Sydney received over 10.3 million domestic overnight visitors - up by 9.1%* on YE Jun 17. Visitors spent nearly 27.7 million nights in Sydney - up by 5.5% on YE Jun 17.

Note: The number of domestic overnight trips to New South Wales increased by 9.3 percent* on last year and by 25.5 percent* compared to four years ago.

Market share

Sydney received 31.3% of visitors and 26.8% of nights in NSW. Compared to YE Jun 17, 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



'Business' (34.9%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (33.1%) and 'holiday' (26.9%). Compared to YE Jun 17, visitors who travelled for 'business' grew by 23.1%* while 'VFR' declined by 2.0% and 'holiday' increased by 15.7%*.

'VFR' (37.8%) was the largest purpose in terms of nights in Sydney, followed by 'business' (30.2%) and 'holiday' (25.1%). Compared to YE Jun 17, nights spent for 'VFR' grew by 4.9% and 'business' increased by 12.7% while 'holiday' grew by 13.5%.

Accommodation in Sydney

'Friends or relatives property' (46.5%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (18.9%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (14.3%) and 'rented house, apartment, flat or unit' (5.6%).

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	3,854	37.4%	8,602	1,726	201	2.2
Sydney	860	8.3%	1,774	1,679	947	2.1
Total intrastate	4,715	45.7%	10,376	3,405	328	2.2
Victoria	2,269	22.0%	6,116	1,744	285	2.7
Queensland	1,656	16.0%	5,743	1,287	224	3.5
ACT	738	7.2%	1,739	387	222	2.4
Other interstate	940	9.1%	3,681	1,005	273	3.9
Total interstate	5,603	54.3%	17,279	4,423	256	3.1
Total Sydney	10,317		27,654	7,828	283	2.7

Regional NSW (3.9 million or 37.4%) was the largest source of visitors to Sydney, followed by Victoria (2.3 million or 22.0%) and Queensland (1.7 million or 16.0%). Compared to YE Jun 17, the regional NSW source market declined by 3.2% while Victoria grew by 26.7%* and Queensland increased by 16.6%*.

Regional NSW (8.6 million or 31.1%) was the largest source market in terms of nights in Sydney, followed by Victoria (6.1 million or 22.1%) and Queensland (5.7 million or 20.8%). Compared to YE Jun 17, nights spent by visitors from regional NSW declined by 3.8% while Victorian nights grew by 22.5%* and nights by Queenslanders increased by 4.9%.

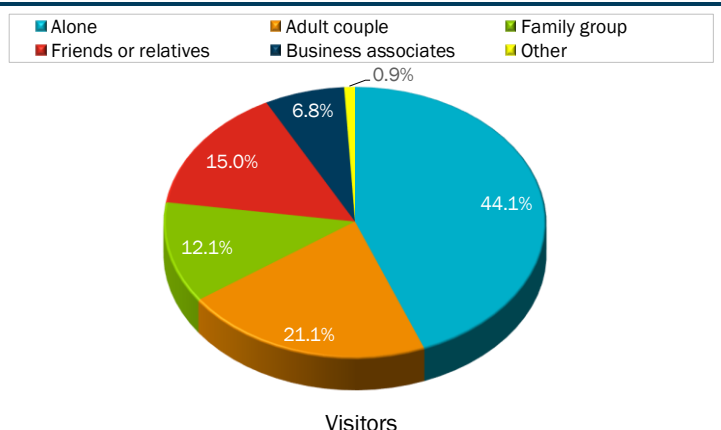
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (70.0%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (45.4%) and 'sightseeing or looking around' (21.2%).

Age groups

'15 to 29 years' (21.2%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (20.7%) and '50 to 59 years' (18.5%).

Travel party



'Alone' (44.1%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (21.1%) and 'friends or relatives' (15.0%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent over \$7.8 billion in Sydney - up by 17.1%* on YE Jun 17. On average, they spent \$283 per night - up by 11.0% on YE Jun 17.

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

Travel to Sydney

Year ended June 2018

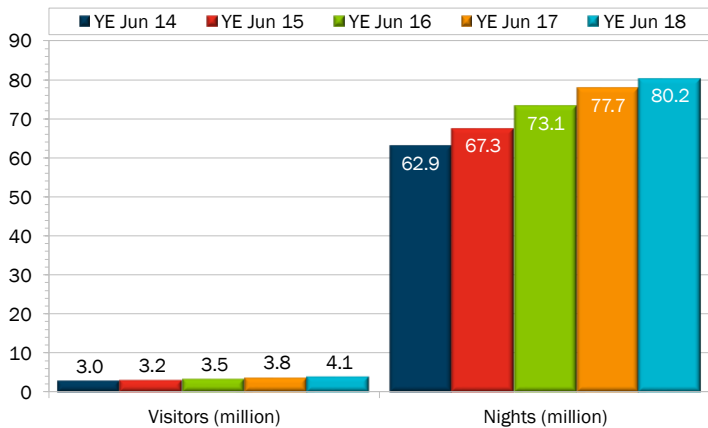
For the period of July 2017 to June 2018

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

Preliminary	YE Jun 17	YE Jun 18	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	33.0	36.0	9.2%	11.3%	28.6%	60.1%
Total nights (million)	103.9	107.8	3.8%	74.4%	25.6%	0.0%
Total spend (billion)	\$17.9	\$19.7	9.9%	48.5%	39.8%	11.6%

International Overnight Travel² - preliminary

Visitors and nights



Sydney received nearly 4.1 million international overnight visitors - up by 5.9%* on YE Jun 17. Visitors spent nearly 80.2 million nights in Sydney - up by 3.2% on YE Jun 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 5.9 percent* on last year and by 36.1 percent* compared to four years ago.

Market share

Sydney received 93.6% of visitors and 84.9% of nights in NSW. Compared to YE Jun 17, the share of visitors was unchanged and the share of nights was up by 0.9% 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	775	19.1%	18,429	3,221	175	23.8
2	USA	457	11.3%	3,663	652	178	8.0
3	New Zealand	377	9.3%	2,551	378	148	6.8
4	United Kingdom	346	8.5%	5,455	548	101	15.8
5	South Korea	220	5.4%	5,198	619	119	23.7
6	Japan	164	4.0%	3,086	343	111	18.8
7	India	151	3.7%	5,665	316	56	37.4
8	Hong Kong	126	3.1%	2,407	313	130	19.1
9	Germany	121	3.0%	2,005	181	90	16.6
10	Singapore	115	2.8%	1,199	242	202	10.4
	Other markets	1,207	29.7%	30,525	2,727	89	25.3
	Total Sydney	4,060		80,182	9,540	119	19.7

Accommodation in Sydney

'Rented house, apartment, flat or unit' (45.1%) 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)⁴

International overnight visitors spent over \$9.5 billion in Sydney - up by 5.6%* on YE Jun 17. On average, they spent \$119 per night - up by 2.4% on YE Jun 17.

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

Preliminary IVS results

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

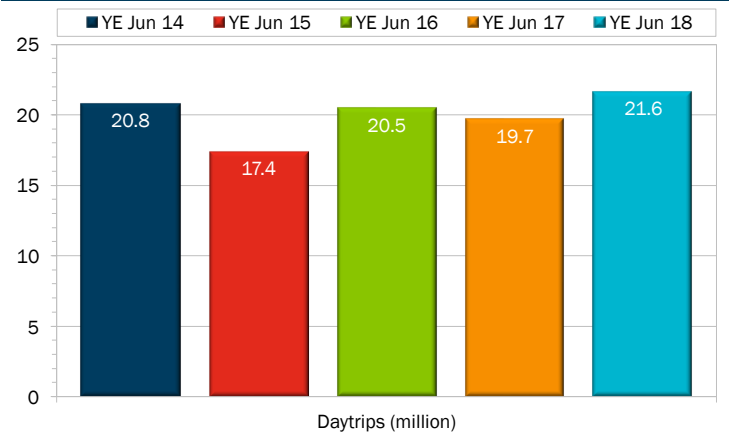
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Jun 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Sydney received over 21.6 million domestic daytrip visitors - up by 9.9%* on YE Jun 17.

Note: The number of domestic daytrips to New South Wales increased by 6.0 percent* on last year and was up by 12.8 percent* compared to four years ago.

Market share

Sydney received 36.0% of daytrips to NSW. Compared to YE Jun 17, the share was up by 1.3% pts.

Main purpose of trip

'Holiday' (44.8%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (31.2%) and 'business' (11.8%).

Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 14.7%* and 'VFR' increased by 7.8% while 'business' grew by 8.5%.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (51.8%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (36.5%) and 'go shopping for pleasure' (16.4%).

Expenditure³

Domestic daytrip visitors spent nearly \$2.3 billion in Sydney - up by 5.9% on YE Jun 17. On average, they spent \$105 per trip - down by 3.7% on YE Jun 17.

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

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.