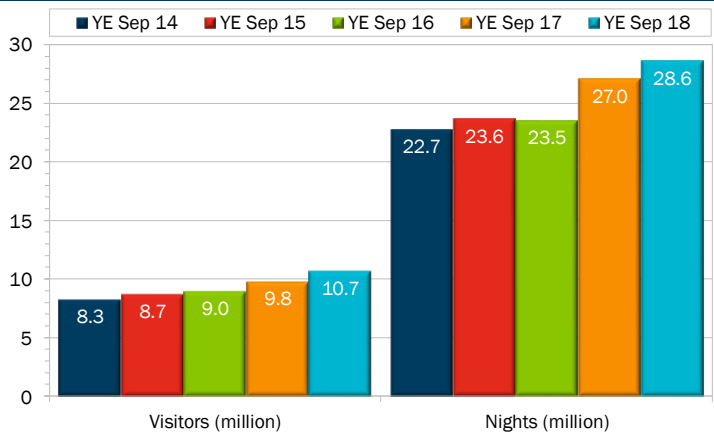


Domestic Overnight Travel¹

Visitors and nights



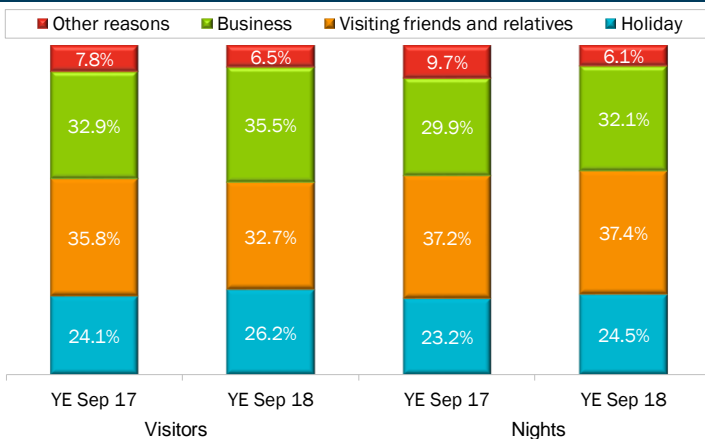
Sydney received nearly 10.7 million domestic overnight visitors - up by 9.4%* on YE Sep 17. Visitors spent nearly 28.6 million nights in Sydney - up by 5.7% on YE Sep 17.

Note: The number of domestic overnight trips to New South Wales increased by 8.4 percent* on last year and by 29.0 percent* compared to four years ago.

Market share

Sydney received 31.7% of visitors and 27.2% of nights in NSW. Compared to YE Sep 17, the share of visitors was up by 0.2% pts and the share of nights was up by 0.1% pt.

Purpose of visit to Sydney



'Business' (35.5%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (32.7%) and 'holiday' (26.2%). Compared to YE Sep 17, visitors who travelled for 'business' grew by 17.8%* while 'VFR' declined by 0.1% and 'holiday' increased by 18.8%*.

'VFR' (37.4%) was the largest purpose in terms of nights in Sydney, followed by 'business' (32.1%) and 'holiday' (24.5%). Compared to YE Sep 17, nights spent for 'VFR' grew by 6.0% and 'business' increased by 13.5%* while 'holiday' grew by 11.2%.

Accommodation in Sydney

'Friends or relatives property' (45.6%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (18.2%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (14.9%) and 'rented house, apartment, flat or unit' (6.5%).

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	4,042	37.9%	9,137	1,881	206	2.3
Sydney	855	8.0%	1,569	1,766	1,126	1.8
Total intrastate	4,897	45.9%	10,706	3,648	341	2.2
Victoria	2,361	22.1%	6,470	1,961	303	2.7
Queensland	1,719	16.1%	5,835	1,407	241	3.4
ACT	705	6.6%	1,562	365	234	2.2
Other interstate	991	9.3%	3,986	1,057	265	4.0
Total interstate	5,776	54.1%	17,854	4,790	268	3.1
Total Sydney	10,673		28,560	8,438	295	2.7

Regional NSW (4.0 million or 37.9%) was the largest source of visitors to Sydney, followed by Victoria (2.4 million or 22.1%) and Queensland (1.7 million or 16.1%). Compared to YE Sep 17, the regional NSW source market grew by 1.0% and Victoria increased by 23.5%* while Queensland grew by 18.5%*.

Regional NSW (9.1 million or 32.0%) was the largest source market in terms of nights in Sydney, followed by Victoria (6.5 million or 22.7%) and Queensland (5.8 million or 20.4%). Compared to YE Sep 17, nights spent by visitors from regional NSW grew by 3.4% and Victorian nights increased by 18.1%* while nights by Queenslanders grew by 3.1%.

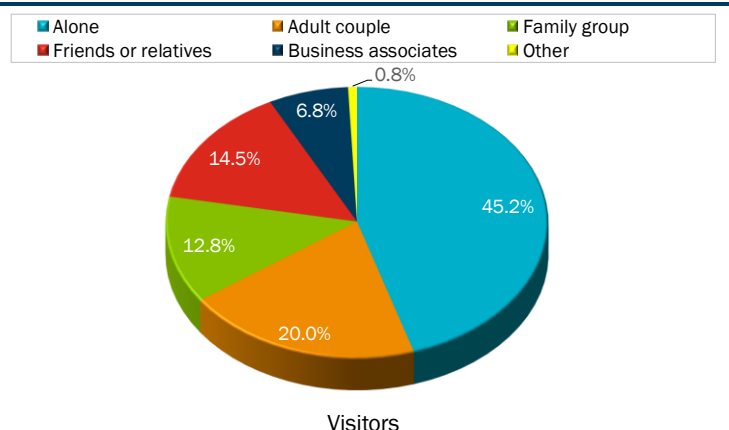
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (70.4%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (45.7%) and 'sightseeing or looking around' (21.6%).

Age groups

'15 to 29 years' (21.2%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (21.2%) and '50 to 59 years' (18.0%).

Travel party



'Alone' (45.2%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (20.0%) and 'friends or relatives' (14.5%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent over \$8.4 billion in Sydney - up by 20.7%* on YE Sep 17. On average, they spent \$295 per night - up by 14.3% on YE Sep 17.

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

Travel to Sydney

Year ended September 2018

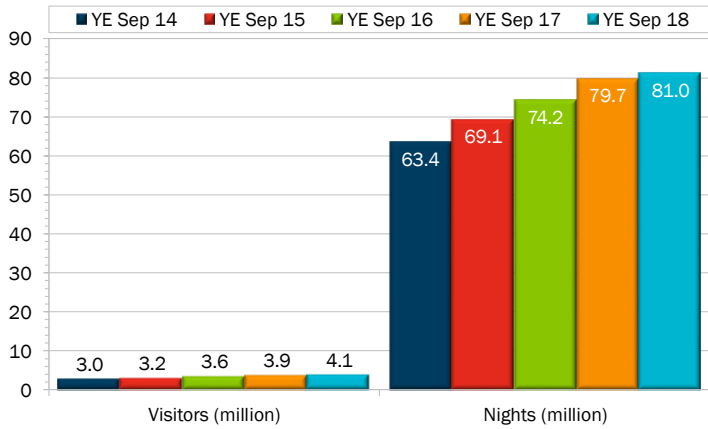
For the period of October 2017 to September 2018

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

Preliminary	YE Sep 17	YE Sep 18	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	34.1	36.7	7.7%	11.0%	29.1%	59.9%
Total nights (million)	106.7	109.6	2.7%	73.9%	26.1%	0.0%
Total spend (billion)	\$18.6	\$20.4	10.0%	47.2%	41.3%	11.4%

International Overnight Travel² - preliminary

Visitors and nights



Sydney received nearly 4.1 million international overnight visitors - up by 3.3%* on YE Sep 17. Visitors spent almost 81.0 million nights in Sydney - up by 1.7% on YE Sep 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 3.4 percent* on last year and by 34.4 percent* compared to four years ago.

Market share

Sydney received 93.5% of visitors and 84.8% of nights in NSW. Compared to YE Sep 17, the share of visitors was down by 0.1% pt 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	757	18.7%	18,932	3,341	176	25.0
2	USA	453	11.2%	3,766	646	171	8.3
3	New Zealand	373	9.2%	2,582	381	147	6.9
4	United Kingdom	339	8.4%	5,355	531	99	15.8
5	South Korea	217	5.4%	4,973	590	119	22.9
6	Japan	172	4.3%	3,364	365	109	19.5
7	India	154	3.8%	5,885	329	56	38.1
8	Hong Kong	125	3.1%	2,158	316	147	17.2
9	Germany	120	3.0%	1,924	176	92	16.0
10	Singapore	116	2.9%	1,309	234	179	11.3
	Other markets	1,223	30.2%	30,748	2,732	89	25.1
	Total Sydney	4,050		80,994	9,641	119	20.0

Accommodation in Sydney

'Rented house, apartment, flat or unit' (45.5%) was the most popular form of accommodation used for nights in Sydney, followed by 'friends or relatives property' (29.5%) and 'standard hotel or motor inn, below 4 star' (4.6%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent over \$9.6 billion in Sydney - up by 3.1% on YE Sep 17. On average, they spent \$119 per night - up by 1.4% on YE Sep 17.

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

Preliminary IVS results

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

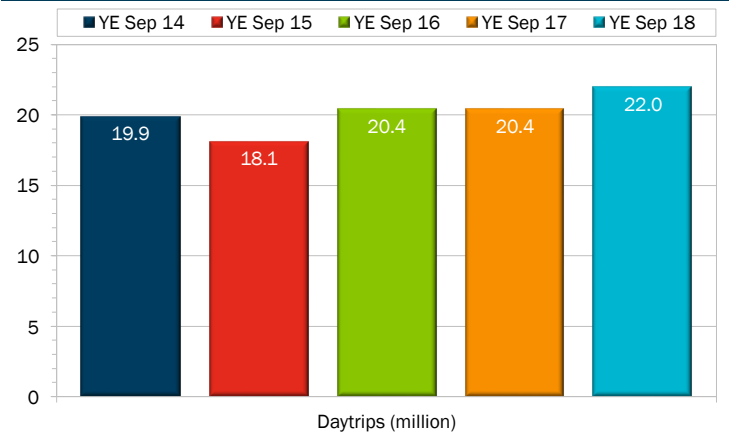
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Sep 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Sydney received nearly 22.0 million domestic daytrip visitors - up by 7.7%* on YE Sep 17.

Note: The number of domestic daytrips to New South Wales increased by 5.1 percent* on last year and was up by 16.6 percent* compared to four years ago.

Market share

Sydney received 35.9% of daytrips to NSW. Compared to YE Sep 17, the share was up by 0.9% pts.

Main purpose of trip

'Holiday' (43.9%) was the largest purpose of trip for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (31.4%) and 'business' (12.9%).

Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 6.8% and 'VFR' increased by 6.4% while 'business' grew by 21.0%*.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (49.4%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (36.7%) and 'go shopping for pleasure' (15.8%).

Expenditure³

Domestic daytrip visitors spent over \$2.3 billion in Sydney - up by 4.8% on YE Sep 17. On average, they spent \$106 per trip - down by 2.7% on YE Sep 17.

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