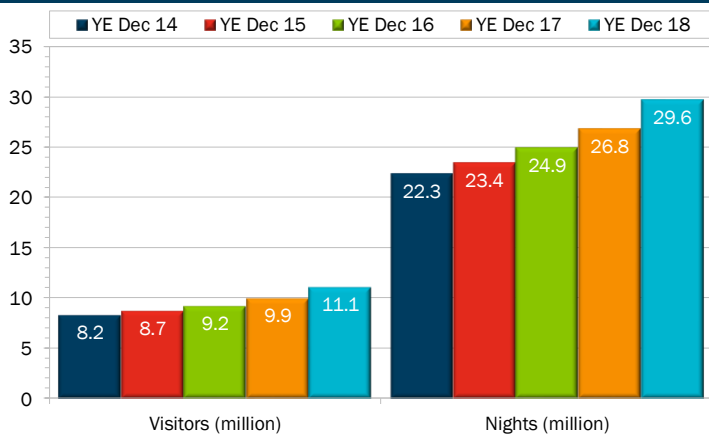


Domestic Overnight Travel¹

Visitors and nights



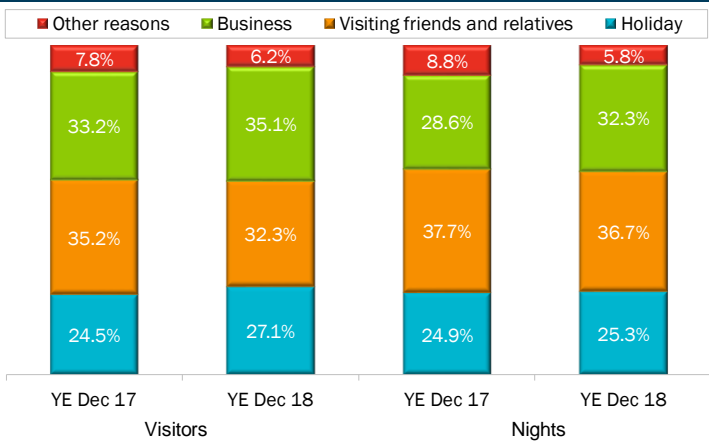
Sydney received nearly 11.1 million domestic overnight visitors - up by 11.5%* on YE Dec 17. Visitors spent over 29.6 million nights in Sydney - up by 10.7%* on YE Dec 17.

Note: The number of domestic overnight trips to New South Wales increased by 9.4 percent* on last year and by 30.4 percent* compared to four years ago.

Market share

Sydney received 32.0% of visitors and 27.6% of nights in NSW. Compared to YE Dec 17, the share of visitors was up by 0.6% pts and the share of nights was up by 0.8% pts.

Purpose of visit to Sydney



'Business' (35.1%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (32.3%) and 'holiday' (27.1%). Compared to YE Dec 17, visitors who travelled for 'business' grew by 18.0%* and 'VFR' increased by 2.4% while 'holiday' grew by 23.0%*.

'VFR' (36.7%) was the largest purpose in terms of nights in Sydney, followed by 'business' (32.3%) and 'holiday' (25.3%). Compared to YE Dec 17, nights spent for 'VFR' grew by 7.8% and 'business' increased by 24.9%* while 'holiday' grew by 12.2%.

Accommodation in Sydney

'Friends or relatives property' (44.9%) was the most popular accommodation used for nights in Sydney. 'Luxury hotel or resort, 4 or 5 star' (18.1%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (15.5%) 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	4,286	38.7%	9,769	2,071	212	2.3
Sydney	891	8.0%	1,706	1,791	1,050	1.9
Total intrastate	5,177	46.8%	11,475	3,862	337	2.2
Victoria	2,368	21.4%	6,507	1,988	305	2.7
Queensland	1,748	15.8%	5,735	1,447	252	3.3
ACT	744	6.7%	1,601	394	246	2.2
Other interstate	1,032	9.3%	4,331	1,136	262	4.2
Total interstate	5,893	53.2%	18,174	4,964	273	3.1
Total Sydney	11,070		29,649	8,826	298	2.7

Regional NSW (4.3 million or 38.7%) was the largest source of visitors to Sydney, followed by Victoria (2.4 million or 21.4%) and Queensland (1.7 million or 15.8%). Compared to YE Dec 17, the regional NSW source market grew by 9.8%* and Victoria increased by 15.9%* and Queensland grew by 18.2%*.

Regional NSW (9.8 million or 32.9%) was the largest source market in terms of nights in Sydney, followed by Victoria (6.5 million or 21.9%) and Queensland (5.7 million or 19.3%). Compared to YE Dec 17, nights spent by visitors from regional NSW grew by 16.2%* and Victorian nights increased by 13.0% and nights by Queenslanders grew by 11.3%.

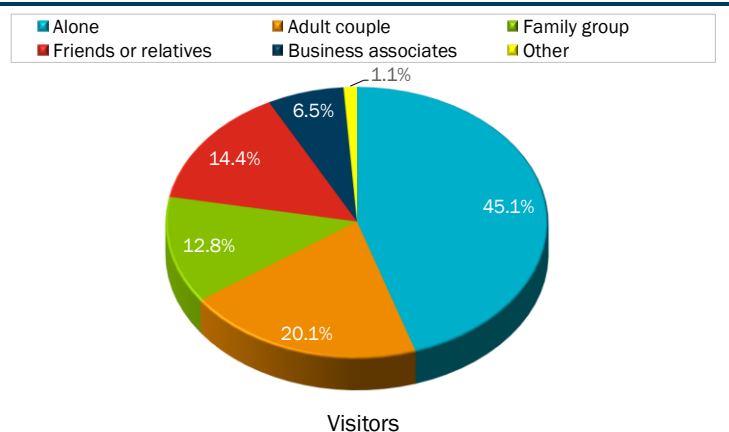
Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (70.7%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (45.6%) and 'sightseeing or looking around' (21.8%).

Age groups

'15 to 29 years' (22.4%) was the largest age group of visitors to Sydney, followed by '40 to 49 years' (19.4%) and '50 to 59 years' (18.2%).

Travel party



'Alone' (45.1%) was the most common travel party amongst visitors to Sydney, followed by 'adult couple' (20.1%) and 'friends or relatives' (14.4%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent over \$8.8 billion in Sydney - up by 21.0%* on YE Dec 17. On average, they spent \$298 per night - up by 9.3% on YE Dec 17.

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

Travel to Sydney

Year ended December 2018

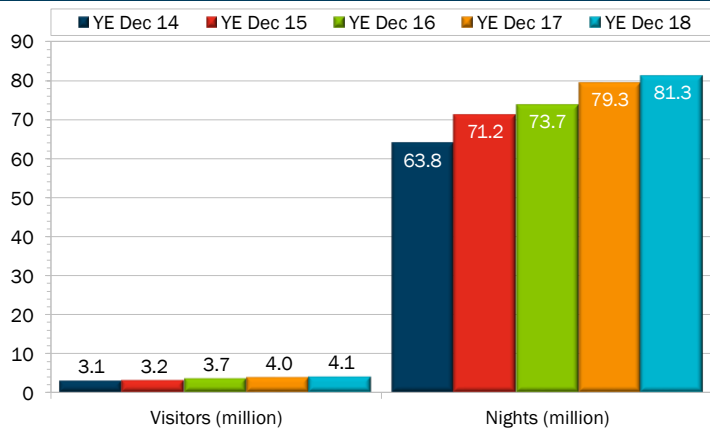
For the period of January 2018 to December 2018

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

	YE Dec 17	YE Dec 18	YE on YE growth	Share of Sydney		
				international overnight	domestic overnight	domestic daytrips
Total visitors (million)	34.1	37.4	9.8%	10.9%	29.6%	59.5%
Total nights (million)	106.1	110.9	4.6%	73.3%	26.7%	0.0%
Total spend (billion)	\$18.7	\$21.1	12.4%	46.1%	41.9%	12.0%

International Overnight Travel²

Visitors and nights



Sydney received nearly 4.1 million international overnight visitors - up by 3.2%* on YE Dec 17. Visitors spent nearly 81.3 million nights in Sydney - up by 2.5% on YE Dec 17.

Note: The number of overnight trips to New South Wales by international visitors increased by 3.0 percent* on last year and by 33.5 percent* compared to four years ago.

Market share

Sydney received 93.6% of visitors and 84.5% of nights in NSW. Compared to YE Dec 17, the share of visitors and the share of nights were up by 0.2% pts each.

Purpose of visit to Sydney

'Holiday' (55.1%) was the largest purpose of visit for visitors to Sydney, followed by 'visiting friends and relatives (VFR)' (25.1%) and 'business' (10.9%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 3.2%* and 'VFR' increased by 4.3%* while 'business' grew by 2.1%.

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	755	18.5%	19,747	3,437	174	26.1
2	USA	467	11.4%	3,921	689	176	8.4
3	New Zealand	375	9.2%	2,798	381	136	7.5
4	United Kingdom	333	8.1%	5,129	520	101	15.4
5	South Korea	203	5.0%	4,736	578	122	23.3
6	Japan	187	4.6%	3,785	380	100	20.2
7	India	156	3.8%	6,429	335	52	41.3
8	Hong Kong	126	3.1%	2,164	305	141	17.1
9	Singapore	120	2.9%	1,315	231	176	11.0
10	Germany	119	2.9%	1,959	181	92	16.5
	Other markets	1,249	30.5%	29,301	2,671	91	23.5
	Total Sydney	4,091		81,284	9,708	119	19.9

Accommodation in Sydney

'Rented house, apartment, flat or unit' (45.6%) 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' (4.4%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent over \$9.7 billion in Sydney - up by 4.9%* on YE Dec 17. On average, they spent \$119 per night - up by 2.3% on YE Dec 17.

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

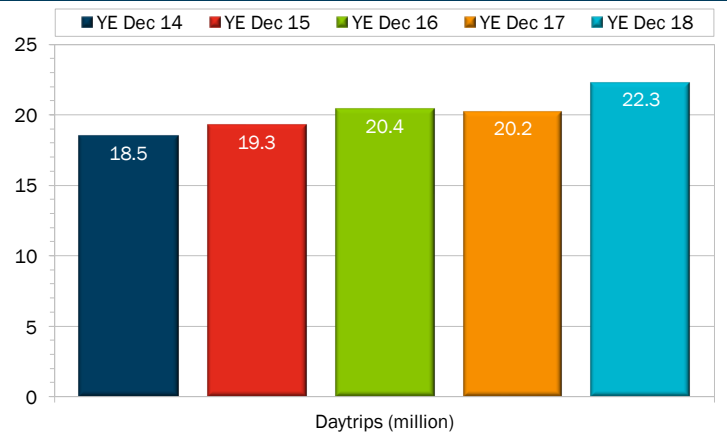
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



Sydney received nearly 22.3 million domestic daytrip visitors - up by 10.3%* on YE Dec 17.

Note: The number of domestic daytrips to New South Wales increased by 6.5 percent* on last year and was up by 18.4 percent* compared to four years ago.

Market share

Sydney received 36.1% of daytrips to NSW. Compared to YE Dec 17, the share was up by 1.2% 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)' (31.9%) and 'business' (12.2%).

Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 10.1%* and 'VFR' increased by 8.1% while 'business' grew by 19.8%*.

Top activities in Sydney

'Eat out, dine at a restaurant or cafe' (51.3%) was the most popular activity undertaken by visitors to Sydney, followed by 'visit friends and relatives' (37.3%) and 'go shopping for pleasure' (16.0%).

Expenditure³

Domestic daytrip visitors spent over \$2.5 billion in Sydney - up by 15.5%* on YE Dec 17. On average, they spent \$113 per trip - up by 4.8% on YE Dec 17.

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