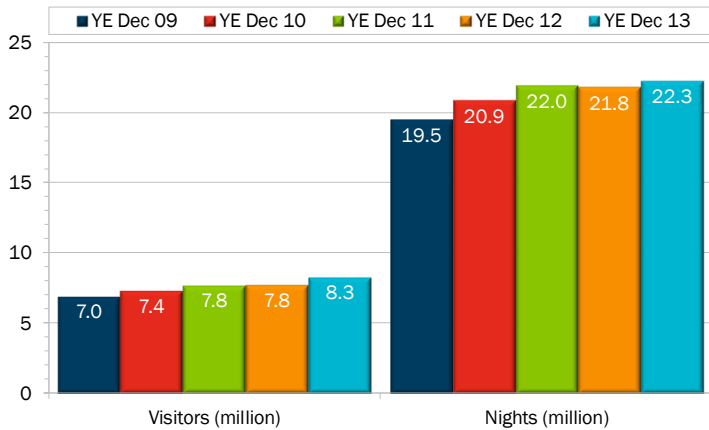


## Domestic Overnight Travel (1)

### Visitors and nights



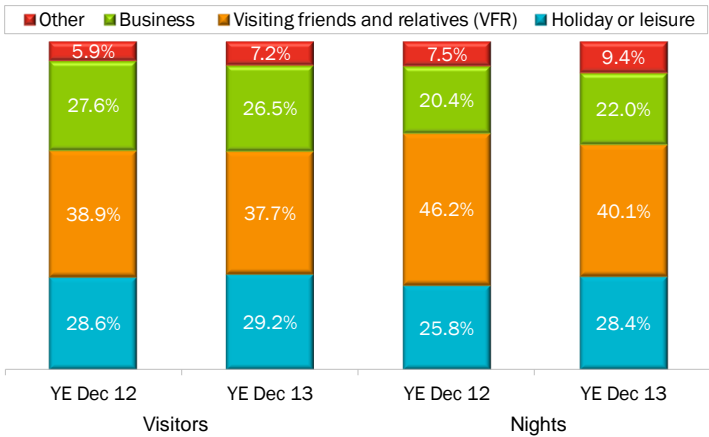
Sydney received over 8.3 million domestic overnight visitors - up by 7.2%\* on YE Dec 12. Visitors spent nearly 22.3 million nights in the region - up by 2.1% on YE Dec 12.

Note: The number of domestic overnight trips to New South Wales increased by 3.7 percent\* on last year and by 12.0 percent\* compared to four years ago.

### Market share

The region received 32.4% of visitors and 26.0% of nights in NSW. Compared to YE Dec 12, the share of visitors was up by 1.1% pts and the share of nights was unchanged.

### Purpose of visit to the region



'Visiting friends and relatives (VFR)' (37.7%) was the largest purpose of visit for visitors to the region, followed by 'holiday or leisure' (29.2%) and 'business' (26.5%). Compared to YE Dec 12, visitors who travelled for 'VFR' grew by 3.8% and 'holiday or leisure' increased by 9.5%\* while 'business' grew by 3.2%.

'VFR' (40.1%) was the largest purpose in terms of nights in the region, followed by 'holiday or leisure' (28.4%) and 'business' (22.0%). Compared to YE Dec 12, nights spent for 'VFR' decreased by 11.3% while 'holiday or leisure' grew by 12.4% and 'business' increased by 10.3%.

### Accommodation

'Friends or relatives property' (49.9%) was the most popular accommodation used for nights in the region, followed by 'standard hotel, motor inn, below 4 star' (17.5%) and 'luxury hotel or resort, 4 or 5 star' (14.7%).

### Origin

Origin	Share of visitors		Share of nights	
	YE Dec 12	YE Dec 13	YE Dec 12	YE Dec 13
Regional NSW	43.0%	42.3%	37.9%	37.3%
Sydney	8.6%	8.8%	5.6%	7.4%
Total intrastate	51.6%	51.0%	43.5%	44.8%
Victoria	19.6%	17.7%	17.9%	15.8%
Queensland	13.7%	13.6%	18.5%	18.6%
ACT	6.3%	8.0%	4.7%	6.2%
Other interstate	8.9%	9.7%	15.3%	14.6%
Total interstate	48.4%	49.0%	56.5%	55.2%

Regional NSW (42.3%) was the largest source of visitors to the region, followed by Victoria (17.7%) and Queensland (13.6%). Compared to YE Dec 12, the regional NSW source market grew by 5.4% and Sydney increased by 9.4%. Over the same period, Victoria declined by 3.6% while Queensland increased by 6.7% and the ACT grew by 37.0%\*.

Regional NSW (37.3%) was the largest source market in terms of nights in the region, followed by Queensland (18.6%) and Victoria (15.8%). Compared to YE Dec 12, nights spent by visitors from regional NSW grew by 0.6% and nights from Sydney increased by 34.8%\*. Over the same period, nights by Victorians declined by 9.9% while Queensland nights increased by 2.8% and nights by visitors from the ACT grew by 32.6%.

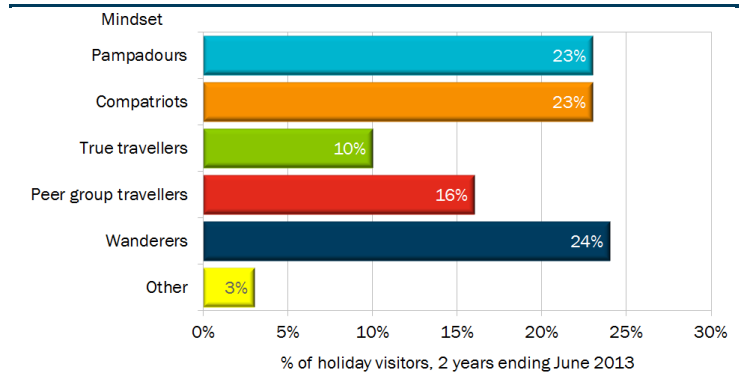
### All transport

'Private or company vehicle' (50.5%) was the most popular form of transport used by visitors to the region, followed by 'air transport' (39.8%) and 'railway' (7.1%).

### Activities

'Eat out at restaurants' (66.7%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (50.5%) and 'shopping for pleasure' (29.1%).

### Australian Travel Mindsets (2)



Pampadours - want luxury; Compatriots - mostly families; True travellers - want depth of experience; Peer group travellers - seeking a fun experience with friends; and Wanderers - taking time to explore and discover.

(2) Source: Inside Story, 2YE Jun 13

### Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent over \$6.0 billion in the region - up by 11.5%\* on YE Dec 12. On average, they spent \$270 per night - up by 9.2% on YE Dec 12.

(3) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Dec 13, TRA

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

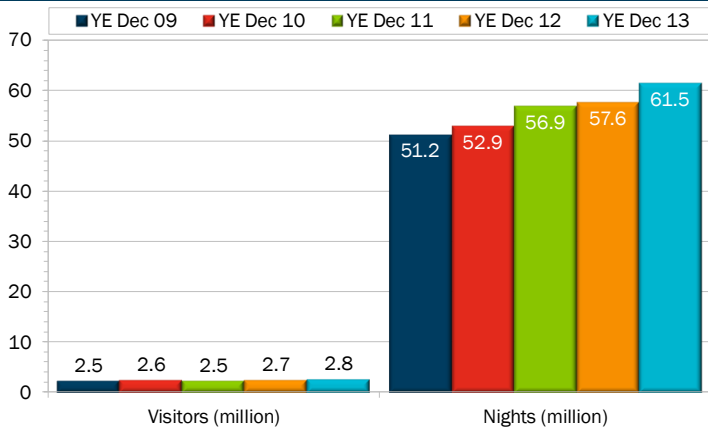
\* The percentage change is statistically significant.

(1) Source: National Visitor Survey (NVS), YE Dec 13, Tourism Research Australia (TRA)

Total visitors (million)	30.6
Total nights (million)	83.8
Total expenditure (billion)	\$14.2

## International Overnight Travel (4)

### Visitors and nights



Sydney received over 2.8 million international overnight visitors - up by 6.2%\* on YE Dec 12. Visitors spent nearly 61.5 million nights in the region - up by 6.7%\* on YE Dec 12.

Note: The number of overnight trips to New South Wales by international visitors increased by 5.7 percent\* on last year and by 12.6 percent\* compared to four years ago.

### Market share

The region received 93.7% of visitors and 84.4% of nights in NSW. Compared to YE Dec 12, the share of visitors was up by 0.5% pts and the share of nights was up by 0.8% pts.

### Purpose of visit to the region

'Holiday / pleasure' (54.7%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (25.1%) and 'business' (13.1%). Compared to YE Dec 12, visitors who travelled for 'holiday / pleasure' grew by 8.8%\* and 'VFR' increased by 6.7%\* while 'business' grew by 4.9%.

### Origin - share of visitors to the region

Share of international visitors to Sydney							
Rank	Market	YE Dec 12	YE Dec 13	Rank	Market	YE Dec 12	YE Dec 13
1	Mainland China & HK	16.1%	17.1%	12	Malaysia	2.2%	2.3%
	Mainland China	13.1%	14.0%	13	Indonesia	1.8%	2.0%
	Hong Kong	3.0%	3.1%	14	Scandinavia	2.0%	1.9%
2	New Zealand	12.5%	11.8%	15	Taiwan	1.8%	1.8%
3	United Kingdom	10.8%	10.9%	16	Italy	1.4%	1.4%
4	USA	9.9%	10.0%	17	Middle East & Nth Africa	1.0%	1.1%
5	Korea	5.3%	5.2%	18	Thailand	1.2%	1.1%
6	Japan	5.6%	5.0%	19	Switzerland	0.9%	1.1%
7	Singapore	3.4%	3.6%	20	Ireland	1.2%	1.0%
8	Germany	3.6%	3.5%	21	Netherlands	0.9%	0.9%
9	India	2.4%	2.7%		Other Asia	2.4%	2.4%
10	Canada	2.8%	2.6%		Other Europe	2.7%	2.8%
11	France	2.2%	2.4%		Other Countries	5.9%	5.4%

### Accommodation

'Rented house / apartment / unit / flat' (45.3%) was the most popular form of accommodation used for nights in the region, followed by 'home of friend or relative' (28.7%) and 'backpacker / hostel' (6.3%).

### Expenditure (incl pre-paid package expenditure) (5)

International overnight visitors spent over \$6.0 billion in the region - up by 7.2%\* on YE Dec 12. On average, they spent \$98 per night - up by 0.4% on YE Dec 12.

(5) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Dec 13, TRA.

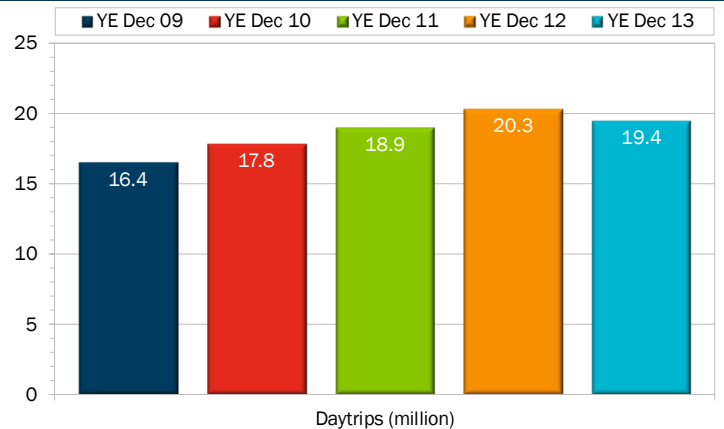
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

(4) Source: International Visitor Survey (IVS), YE Dec 13, TRA

## Domestic Daytrip Travel (6)

### Daytrips



Sydney received over 19.4 million domestic daytrip visitors - down by 4.2% on YE Dec 12.

Note: The number of domestic daytrips to New South Wales decreased by 5.4 percent\* on last year, but was up by 10.1 percent\* compared to four years ago.

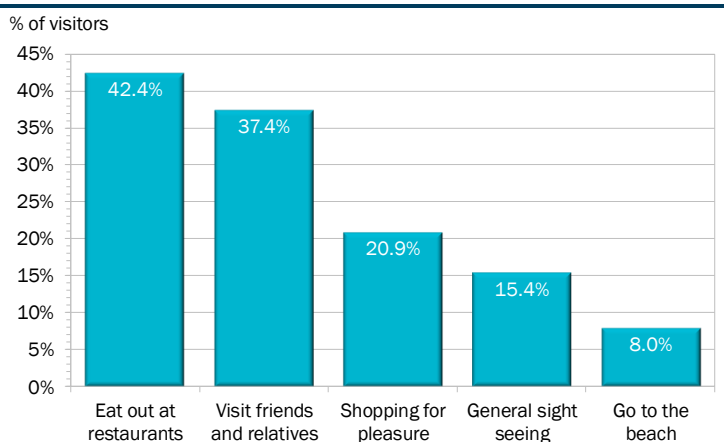
### Market share

The region received 37.4% of daytrips to NSW. Compared to YE Dec 12, the share was up by 0.5% pts.

### Main purpose of trip

'Holiday or leisure' (44.8%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (31.2%) and 'business' (11.2%). Compared to YE Dec 12, visitors who travelled for 'holiday or leisure' declined by 6.5% and 'VFR' decreased by 3.1% while 'business' fell by 13.5%.

### Activities



### Expenditure (7)

Domestic daytrip visitors spent over \$2.1 billion in the region - down by 4.9% on YE Dec 12. On average, they spent \$111 per trip - down by 0.8% on YE Dec 12.

(7) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Dec 13, TRA

### 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.

(6) Source: NVS, YE Dec 13, TRA