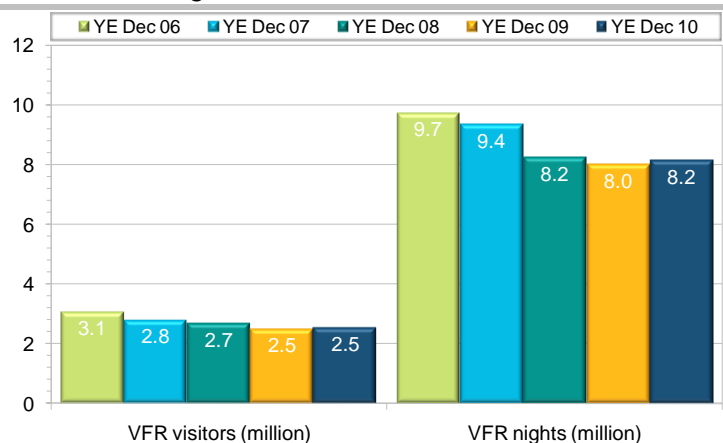




Domestic Overnight VFR Travel ⁽¹⁾

Visitors and nights



Sydney received 2.5 million domestic overnight visitors who visited the region for the purpose of 'visiting friends and relatives' (VFR) - up by 1.3% on YE Dec 09. VFR visitors spent 8.2 million nights in the region - up by 1.8% on YE Dec 09.

Market share

VFR travel represented 35.5% of visitors and 40.1% of nights in Sydney. Compared to YE Dec 09, the share of visitors was down by 1.3% pts and the share of nights was down by 1.9% pts.

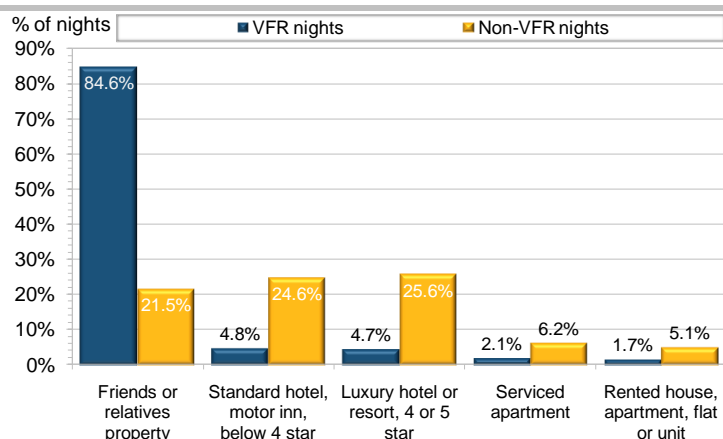
The region received 31.4% of VFR visitors and 30.9% of VFR nights in NSW. Compared to YE Dec 09, the share of visitors was down by 0.6% pts and the share of nights was down by 1.1% pts.

Month returned from visit to Sydney

July (10.6%) was the most popular month for VFR **visitors** to visit Sydney, while August (6.3%) was the least popular.

More VFR **nights** in Sydney were spent in January (16.3%) than any other month, while August (5.1%) had the least nights.

Accommodation

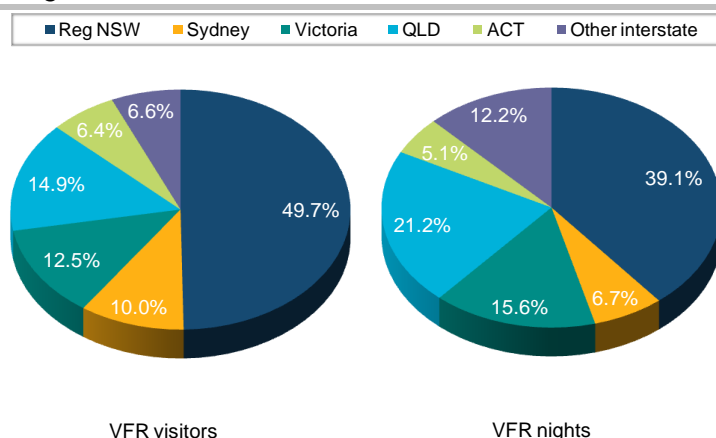


'Friends or relatives property' (84.6%) was the most popular accommodation type used for VFR nights in Sydney, followed by 'standard hotel, motor inn, below 4 star' (4.8%) and 'luxury hotel or resort, 4 or 5 star' (4.7%).

Age

'55 to 64 years' (21.4%) was the largest age group of VFR visitors to the region, followed by '65 years and over' (19.9%) and '45 to 54 years' (16.7%).

Origin



Sydney received 59.7% of VFR visitors and 45.9% of VFR nights from **intrastate** (regional NSW contributed more than Sydney for both visitors and nights).

Interstate contributed 40.3% of VFR visitors and 54.1% of VFR nights in the region (Queensland was the biggest interstate market for both visitors and nights).

Length of stay

VFR visitors stayed, on average, 3.2 nights in the region.

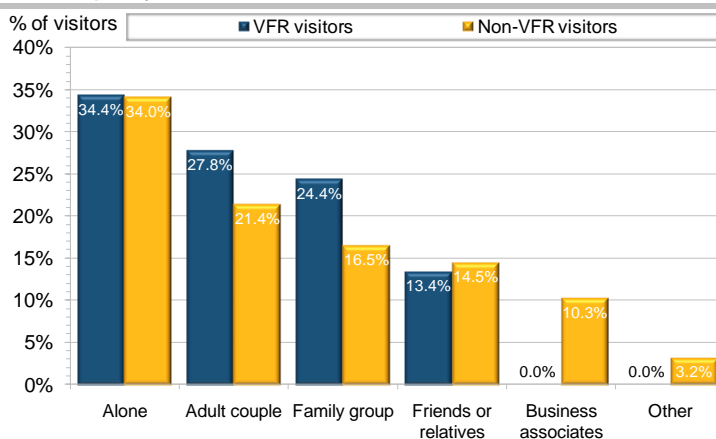
All transport

'Private or company car' (63.8%) was the most popular form of transport used by VFR visitors to Sydney, followed by 'air transport' (28.1%) and 'railway' (7.7%).

Activities

'Visit friends and relatives' (89.5%) was the most popular activity undertaken by VFR visitors to Sydney, followed by 'eat out at restaurants' (56.9%) and 'go shopping for pleasure' (32.2%).

Travel party



'Alone' (34.4%) was the largest travel party of VFR visitors to the region, followed by 'adult couple' (27.8%) and 'family group' (24.4%).

Expenditure (excl motor vehicles purchases etc) ⁽²⁾

VFR visitors spent \$1.0 billion in Sydney. On average, they spent \$126 per night in Sydney.

(2) Estimated using data from TRA's modelled domestic overnight visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of nights.

Note: Percentage change figures provided in this snapshot do not necessarily represent statistically significant change.

(1) Source: National Visitor Survey, YE Dec 10, Tourism Research Australia (TRA) - unless otherwise indicated

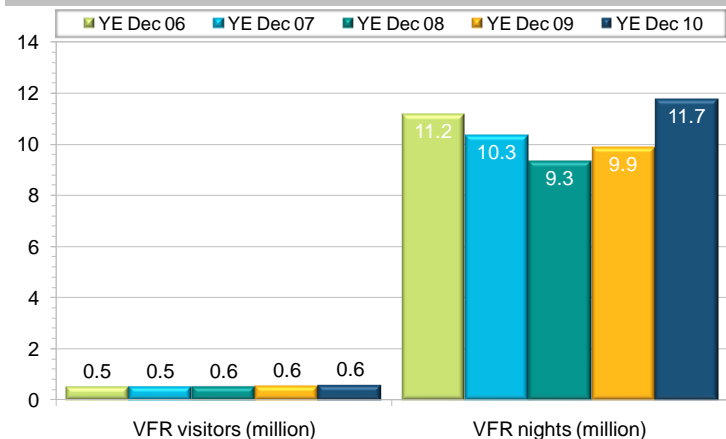
Travel to Sydney to Visit Friends and Relatives

Year ended December 2010

VFR visitors to Sydney (million)	8.5
VFR nights in Sydney (million)	19.9
VFR expenditure in Sydney (billion)	\$2.1

International Overnight VFR Travel ⁽³⁾

Visitors and nights



Sydney received 601,100 international overnight VFR visitors - up by 3.8% on YE Dec 09. VFR visitors spent 11.7 million nights in the region - up by 18.9% on YE Dec 09.

Market share

VFR travel represented 22.6% of visitors and 21.6% of nights in Sydney. Compared to YE Dec 09, the share of visitors was down by 0.1 pt and the share of nights was up by 2.7% pts.

The region received 83.4% of VFR visitors and 82.3% of VFR nights in NSW. Compared to YE Dec 09, the share of visitors was down by 0.3% pts and the share of nights was up by 0.2% pts.

Seasonality

The December quarter (29.0%) had the highest proportion of VFR visitors who had visited Sydney, while the June quarter (21.6%) had the lowest.

Origin

No.	Market	Share	No.	Market	Share
1	New Zealand	20.2%	12	France	1.5%
2	United Kingdom	15.9%	13	Germany	1.5%
3	Mainland China & HK	9.3%	14	Ireland	1.5%
	Mainland China	5.9%	15	Scandinavia	1.5%
	Hong Kong	3.4%	16	Thailand	1.2%
4	USA	7.9%	17	Taiwan	1.1%
5	India	4.3%	18	Middle East & Nth Africa	1.0%
6	Korea	4.1%	19	Italy	0.8%
7	Japan	3.3%	20	Netherlands	0.7%
8	Canada	2.9%	21	Switzerland	0.6%
9	Singapore	2.7%		Other Asia	3.9%
10	Indonesia	2.0%		Other Europe	2.2%
11	Malaysia	1.9%		Other Countries	8.0%

New Zealand (20.2%) was the region's largest source market of VFR visitors, followed by the UK (15.9%).

Accommodation

'Home of friend or relative' (88.8%) was the most popular accommodation type used for VFR nights in Sydney, followed by 'rented house / apartment / unit / flat' (6.5%) and 'standard hotel / motel / motor inn, below 4 star' (1.4%).

Expenditure (excl package expenditure) ⁽⁴⁾

VFR visitors spent \$714 million in Sydney. On average, they spent \$61 per night in Sydney.

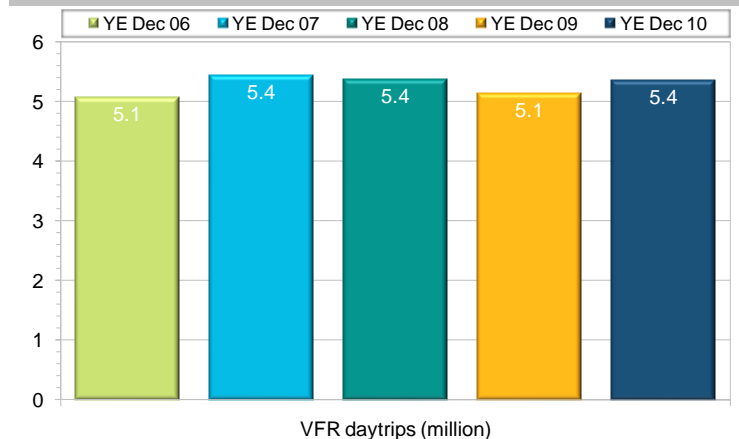
(4) Estimated using data from TRA's modelled international visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of nights.

Note: Percentage change figures provided in this snapshot do not necessarily represent statistically significant change.

(3) Source: International Visitor Survey, YE Dec 10, TRA

Domestic Daytrip VFR Travel ⁽⁵⁾

Daytrips



Sydney received 5.4 million domestic daytrip VFR visitors - up by 4.2% on YE Dec 09.

Market share

VFR travel represented 30.7% of daytrips in Sydney. Compared to YE Dec 09, the share was down by 1.1% pts.

Sydney received 37.7% of VFR daytrips in NSW. Compared to YE Dec 09, the share was up by 1.6% pts.

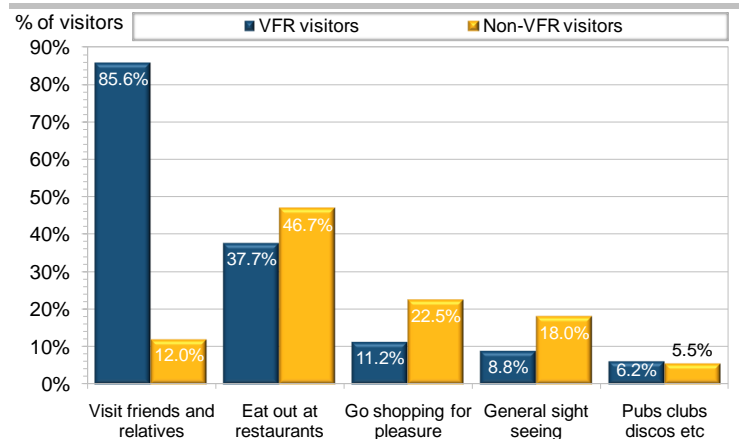
Month returned from trip to Sydney

December (13.0%) was the most popular month for VFR visitors to visit Sydney, while August (5.9%) was the least popular.

Age

'65 years and over' (23.5%) was the largest age group of VFR visitors to Sydney, followed by '55 to 64 years' (17.6%) and '35 to 44 years' (16.7%).

Activities



'Visit friends and relatives' (85.6%) was the most popular activity undertaken by VFR visitors to the region. 'Eat out at restaurants' (37.7%) was the 2nd most popular, followed by 'go shopping for pleasure' (11.2%) and 'general sight seeing' (8.8%).

Expenditure ⁽⁶⁾

VFR visitors spent \$330 million in Sydney. On average, they spent \$62 per trip to Sydney.

(6) Estimated using data from TRA's modelled domestic day visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of visitors.