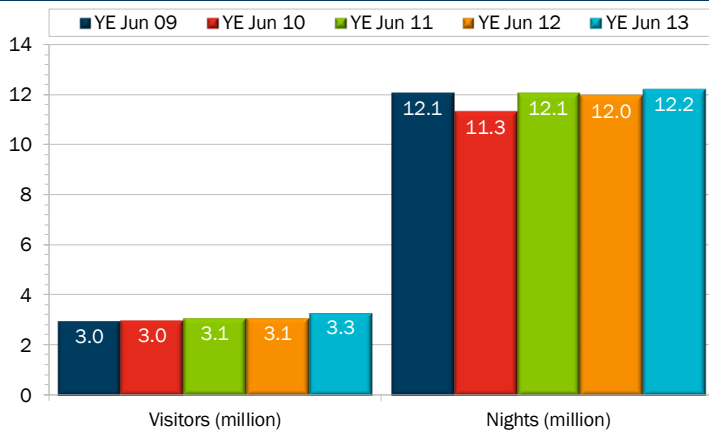


Domestic Overnight Travel (1)

Visitors and nights



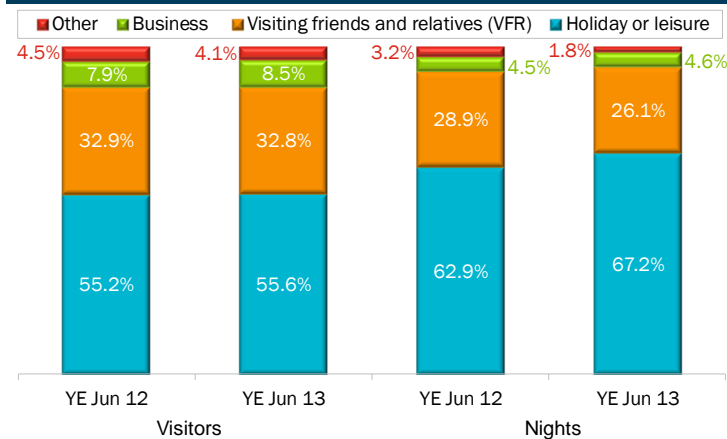
Mid North Coast sub-region received 3.3 million domestic overnight visitors - up by 7.0% on YE Jun 12. Visitors spent 12.2 million nights in the sub-region - up by 2.2% on YE Jun 12.

Note: The number of domestic overnight trips to regional New South Wales increased by 4.2 percent* on last year and by 10.8 percent* compared to four years ago.

Market share

The sub-region received 18.7% of visitors and 19.3% of nights in regional NSW. Compared to YE Jun 12, the share of visitors was up by 0.5 pts and share of nights was down by 0.4 pts.

Purpose of visit to the sub-region



'Holiday or leisure' (55.6%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (32.8%) and 'business' (8.5%). Compared to YE Jun 12, visitors who travelled for 'holiday or leisure' grew by 7.6% and 'VFR' increased by 6.8% while 'business' grew by 15.0%.

'Holiday or leisure' (67.2%) was the largest purpose in terms of nights in the sub-region, followed by 'VFR' (26.1%) and 'business' (4.6%). Compared to YE Jun 12, nights spent for 'holiday or leisure' grew by 9.1% while 'VFR' decreased by 7.9% and 'business' increased by 2.8%.

Accommodation

'Friends or relatives property' (27.1%) was the most popular accommodation used for nights in the sub-region, followed by 'caravan park or commercial camping ground' (21.6%) and 'rented house, apartment, flat or unit' (18.1%).

Mid North Coast sub-region covers Port Stephens to Coffs Harbour including Great Lakes, Forster, Taree, Wingham, Port Macquarie, South West Rocks, Macksville and Bellingen.

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

Origin

| Origin | Share of visitors | | Share of nights | |
|------------------|-------------------|-----------|-----------------|-----------|
| | YE Jun 12 | YE Jun 13 | YE Jun 12 | YE Jun 13 |
| Regional NSW | 47.8% | 51.5% | 45.7% | 47.2% |
| Sydney | 33.5% | 33.1% | 32.1% | 36.0% |
| Total intrastate | 81.4% | 84.5% | 77.8% | 83.2% |
| Victoria | 4.2% | 3.6% | 5.6% | 4.8% |
| Queensland | 10.0% | 9.6% | 11.0% | 9.2% |
| ACT | 2.1% | 1.1% | 2.9% | 1.1% |
| Other interstate | 2.2% | 1.2% | 2.7% | 1.6% |
| Total interstate | 18.6% | 15.4% | 22.2% | 16.8% |

Regional NSW (51.5%) was the largest source of visitors to the sub-region, followed by Sydney (33.1%) and Queensland (9.6%). Compared to YE Jun 12, the regional NSW source market grew by 15.1%* and Sydney increased by 5.4%. Over the same period, Victoria declined by 8.5% while Queensland grew by 2.2% and the ACT decreased by 44.8%.

Regional NSW (47.2%) was the largest source market in terms of nights in the sub-region, followed by Sydney (36.0%) and Queensland (9.2%). Compared to YE Jun 12, nights spent by visitors from regional NSW grew by 5.6% and nights from Sydney increased by 14.7%. Over the same period, nights by Victorians declined by 12.4% and Queensland nights decreased by 14.4% while nights by visitors from the ACT fell by 61.4%.

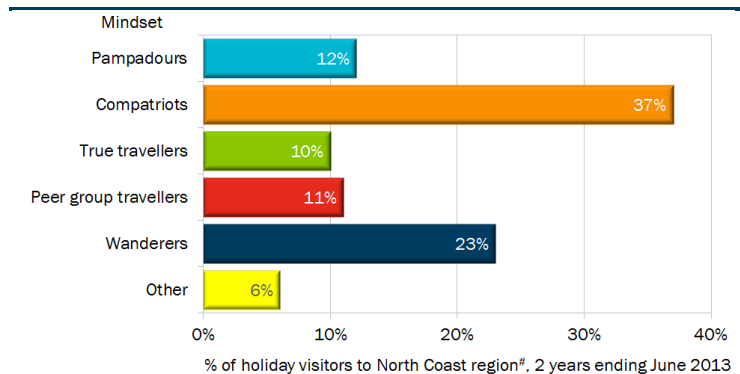
All transport

'Private or company vehicle' (91.9%) was the most popular form of transport used by visitors to the sub-region, followed by 'air transport' (4.0%) and 'railway' (1.3%).

Activities

'Eat out at restaurants' (60.3%) was the most popular activity undertaken by visitors to the sub-region, followed by 'go to the beach' (49.7%) and 'visit friends and relatives' (38.8%).

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

* combined sub-regions of Northern Rivers and Mid North Coast.

Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent over \$1.8 billion in the sub-region - up by 8.6% on YE Jun 12. On average, visitors spent \$149 per night in the sub-region - up by 6.3% on YE Jun 12.

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

* The percentage change is statistically significant.

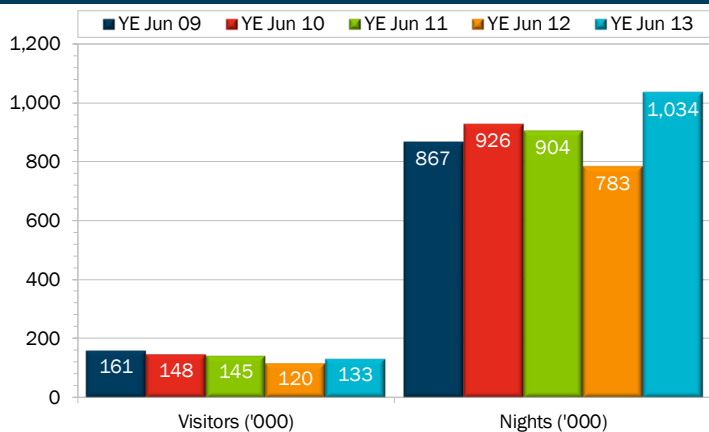
Travel to Mid North Coast sub-region

Year ended June 2013

| | |
|-----------------------------|---------|
| Total visitors (million) | 7.4 |
| Total nights (million) | 13.3 |
| - domestic nights | 92.2% |
| - international nights | 7.8% |
| Total expenditure (million) | \$2,317 |

International Overnight Travel (4)

Visitors and nights



Mid North Coast sub-region received 133,400 international overnight visitors - up by 11.5%* on YE Jun 12. Visitors spent 1.0 million nights in the sub-region - up by 32.1% on YE Jun 12.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 3.6 percent on last year and by 0.5 percent compared to four years ago.

Market share

The sub-region received 22.7% of visitors and 9.8% of nights in regional NSW. Compared to YE Jun 12, the share of visitors was up by 1.6% pts and the share of nights was up by 2.6% pts.

Purpose of visit to the sub-region

'Holiday / pleasure' (78.4%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (16.2%) and 'business' (2.0%). Compared to YE Jun 12, visitors who travelled for 'holiday / pleasure' grew by 6.7% and 'VFR' increased by 18.3% while 'business' declined by 12.9%.

Origin - share of visitors to the sub-region

| Share of international visitors to Mid North Coast sub-region | | | | | | | |
|---|---------------------|-----------|-----------|------|--------------------------|-----------|-----------|
| Rank | Market | YE Jun 12 | YE Jun 13 | Rank | Market | YE Jun 12 | YE Jun 13 |
| 1 | United Kingdom | 24.6% | 23.5% | 12 | Korea | 1.1% | 1.8% |
| 2 | New Zealand | 9.8% | 10.1% | 13 | Italy | 0.7% | 1.8% |
| 3 | USA | 9.0% | 10.1% | 14 | Ireland | 1.8% | 1.8% |
| 4 | Germany | 12.7% | 9.7% | 15 | Singapore | 1.7% | 1.5% |
| 5 | Canada | 5.5% | 5.1% | 16 | Thailand | 0.3% | 1.2% |
| 6 | Scandinavia | 4.9% | 4.7% | 17 | Japan | 1.1% | 1.0% |
| 7 | France | 4.5% | 4.0% | 18 | Malaysia | 0.5% | 0.9% |
| 8 | Netherlands | 3.7% | 3.5% | 19 | Indonesia | 0.2% | 0.8% |
| 9 | Switzerland | 2.5% | 3.4% | 20 | Taiwan | 0.6% | 0.5% |
| 10 | Mainland China & HK | 3.0% | 2.6% | 21 | Middle East & Nth Africa | 0.6% | 0.3% |
| | Mainland China | 1.8% | 1.5% | | Other Asia | 0.7% | 1.0% |
| | Hong Kong | 1.2% | 1.1% | | Other Europe | 5.4% | 5.0% |
| 11 | India | 0.5% | 1.9% | | Other Countries | 4.6% | 3.6% |

The UK (23.5%) was the region's largest source of visitors.

Accommodation

'Home of friend or relative' (38.6%) was the most popular form of accommodation used for nights in the sub-region, followed by 'rented house / apartment / unit / flat' (15.1%).

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

International overnight visitors spent \$39 million in the sub-region - down by 22.7% on YE Jun 12. On average, visitors spent \$37 per night in the sub-region - down by 41.5% on YE Jun 12.

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

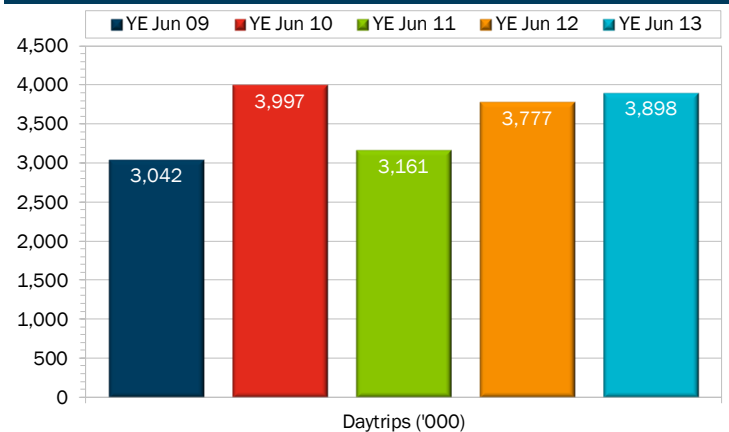
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel (6)

Daytrips



Mid North Coast sub-region received almost 3.9 million domestic daytrip visitors - up by 3.2% on YE Jun 12.

Note: The number of domestic daytrips to regional New South Wales decreased by 4.7 percent* on last year, but was up by 11.1 percent* compared to four years ago.

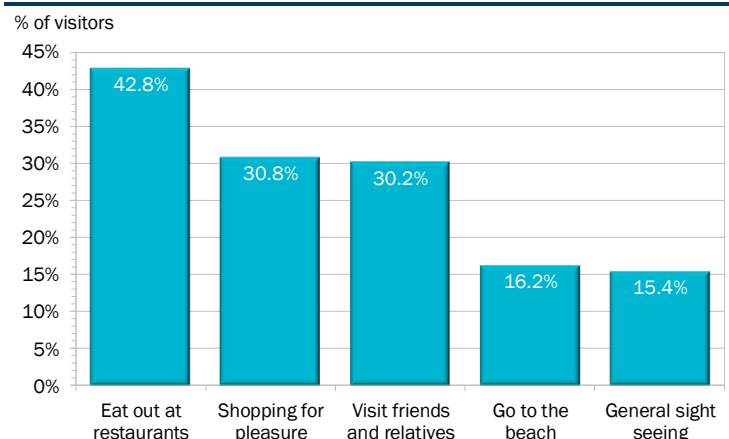
Market share

The sub-region received 11.9% of daytrips to regional NSW. Compared to YE Jun 12, the share was up by 0.9% pts.

Main purpose of trip

'Holiday or leisure' (56.9%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (23.2%) and 'business' (8.1%). Compared to YE Jun 12, visitors who travelled for 'holiday or leisure' grew by 20.3%* while 'VFR' decreased by 0.5% and 'business' fell by 13.2%.

Activities



Expenditure (7)

Domestic daytrip visitors spent \$457 million in the sub-region - up by 3.5% on YE Jun 12. On average, they spent \$117 per trip to the sub-region - up by 0.3% on YE Jun 12.

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

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.

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