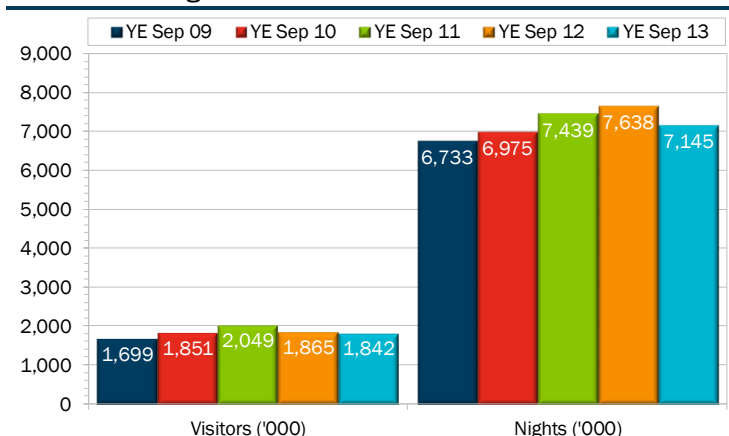


Domestic Overnight Travel (1)

Visitors and nights



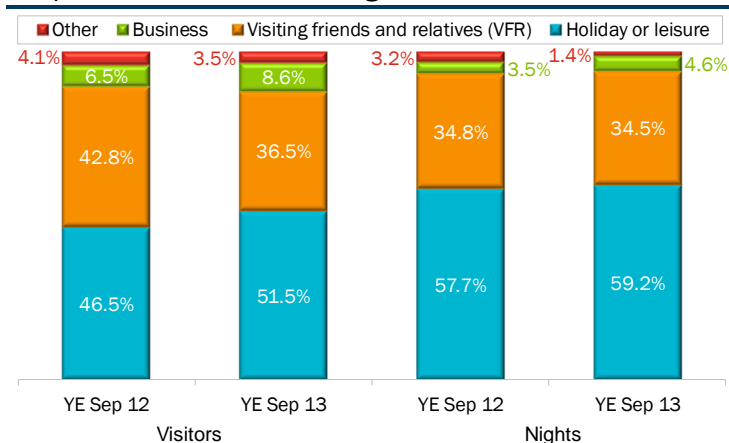
Northern Rivers sub-region received over 1.8 million domestic overnight visitors - down by 1.2% on YE Sep 12. Visitors spent over 7.1 million nights in the sub-region - down by 6.5% on YE Sep 12.

Note: The number of domestic overnight trips to regional New South Wales increased by 5.8 percent* on last year and by 11.9 percent* compared to four years ago.

Market share

The sub-region received 10.1% of visitors and 11.2% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was down by 0.7% pts and the share of nights was down by 1.5% pts.

Purpose of visit to the sub-region



'Holiday or leisure' (51.5%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (36.5%) and 'business' (8.6%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' grew by 9.5% while 'VFR' declined by 15.9%* and 'business' increased by 31.4%.

'Holiday or leisure' (59.2%) was the largest purpose in terms of nights in the sub-region, followed by 'VFR' (34.5%) and 'business' (4.6%). Compared to YE Sep 12, nights spent for 'holiday or leisure' declined by 4.0% and 'VFR' decreased by 7.2% while 'business' grew by 22.0%.

Accommodation

'Friends or relatives property' (34.9%) was the most popular accommodation used for nights in the sub-region, followed by 'caravan park or commercial camping ground' (24.8%) and 'rented house, apartment, flat or unit' (12.1%).

Northern Rivers sub-region covers Grafton to Tweed Heads including Ballina, Lismore, Byron Bay and Murwillumbah.

* The percentage change is statistically significant.

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

Origin

Origin	Share of visitors		Share of nights	
	YE Sep 12	YE Sep 13	YE Sep 12	YE Sep 13
Regional NSW	33.9%	30.5%	26.1%	26.8%
Sydney	13.1%	14.5%	16.0%	14.8%
Total intrastate	47.0%	45.0%	42.1%	41.6%
Victoria	6.8%	5.3%	11.1%	9.5%
Queensland	42.8%	44.5%	41.3%	40.9%
ACT	1.2%	2.6%	2.6%	4.3%
Other interstate	2.2%	2.7%	2.9%	3.8%
Total interstate	53.0%	55.0%	57.9%	58.4%

Queensland (44.5%) was the largest source of visitors to the sub-region, followed by regional NSW (30.5%) and Sydney (14.5%). Compared to YE Sep 12, the regional NSW source market declined by 11.4% while Sydney grew by 9.4%. Over the same period, Victoria declined by 23.0% while Queensland increased by 2.5% and the ACT grew by 104%*.

Queensland (40.9%) was the largest source market in terms of nights in the sub-region, followed by regional NSW (26.8%) and Sydney (14.8%). Compared to YE Sep 12, nights spent by visitors from regional NSW declined by 4.0% and nights from Sydney decreased by 13.4%. Over the same period, nights by Victorians declined by 20.0% and Queensland nights decreased by 7.4% while nights by visitors from the ACT grew by 51.5%.

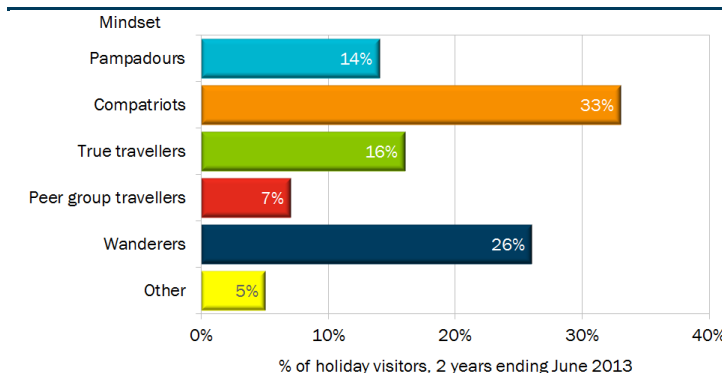
All transport

'Private or company vehicle' (80.7%) was the most popular form of transport used by visitors to the sub-region, followed by 'air transport' (14.5%) and 'railway' (1.8%).

Activities

'Eat out at restaurants' (63.1%) was the most popular activity undertaken by visitors to the sub-region, followed by 'go to the beach' (47.9%) and 'visit friends and relatives' (46.9%).

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 nearly \$1.1 billion in the sub-region - up by 0.8% on YE Sep 12. On average, visitors spent \$147 per night in the sub-region - up by 7.8% on YE Sep 12.

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

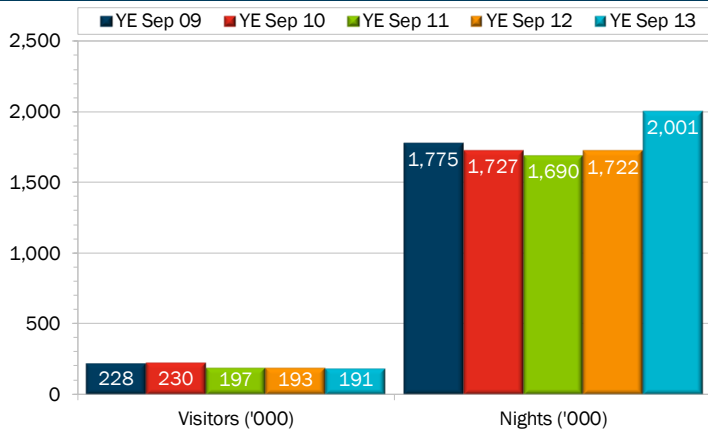
Travel to Northern Rivers sub-region

Year ended September 2013

Total visitors ('000)	4,956
Total nights ('000)	9,146
- domestic nights	78.1%
- international nights	21.9%
Total expenditure (million)	\$1,504

International Overnight Travel (4)

Visitors and nights



Northern Rivers sub-region received 191,300 international overnight visitors - down by 1.0% on YE Sep 12. Visitors spent 2.0 million nights in the sub-region - up by 16.2% on YE Sep 12.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 1.8 percent on last year and by 1.0 percent compared to four years ago.

Market share

The sub-region received 32.5% of visitors and 18.3% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was down by 0.9% pts and share of nights was up by 2.6% pts.

Purpose of visit to the sub-region

'Holiday / pleasure' (82.9%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (14.4%) and 'business' (1.8%). Compared to YE Sep 12, visitors who travelled for 'holiday / pleasure' declined by 1.5% and 'VFR' decreased by 1.3% while 'business' fell by 12.0%.

Origin - share of visitors to the sub-region

Share of international visitors to Northern Rivers sub-region							
Rank	Market	YE Sep 12	YE Sep 13	Rank	Market	YE Sep 12	YE Sep 13
1	United Kingdom	24.6%	24.4%	12	Ireland	2.5%	1.6%
2	Germany	11.5%	11.7%	13	Singapore	1.8%	1.4%
3	New Zealand	10.8%	9.1%	14	Japan	1.4%	1.1%
4	USA	7.4%	6.6%	15	Taiwan	0.3%	0.8%
5	Scandinavia	6.7%	6.5%	16	Korea	0.8%	0.7%
6	France	4.6%	5.4%	17	Middle East & Nth Africa	1.0%	0.6%
7	Canada	4.7%	5.2%	18	Indonesia	0.4%	0.4%
8	Netherlands	2.9%	4.0%	18	Thailand	0.6%	0.4%
9	Switzerland	3.3%	3.9%	20	India	0.0%	0.3%
10	Italy	2.5%	2.9%	21	Malaysia	0.9%	0.3%
11	Mainland China & HK	1.1%	2.3%		Other Asia	0.2%	0.7%
	Mainland China	0.7%	1.6%		Other Europe	4.9%	5.0%
	Hong Kong	0.4%	0.7%		Other Countries	4.9%	4.7%

Accommodation

'Home of friend or relative' (30.7%) was the most popular form of accommodation used for nights in the sub-region, followed by 'backpacker / hostel' (23.2%).

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

International overnight visitors spent \$107 million in the sub-region - down by 10.7% on YE Sep 12. On average, visitors spent \$53 per night in the sub-region - down by 23.2% on YE Sep 12.

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

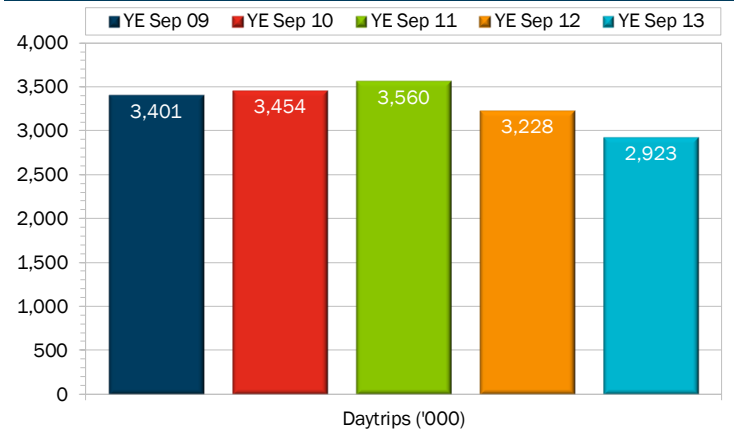
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel (6)

Daytrips



Northern Rivers sub-region received over 2.9 million domestic daytrip visitors - down by 9.4% on YE Sep 12.

Note: The number of domestic daytrips to regional New South Wales decreased by 4.3 percent* on last year, but was up by 6.4 percent* compared to four years ago.

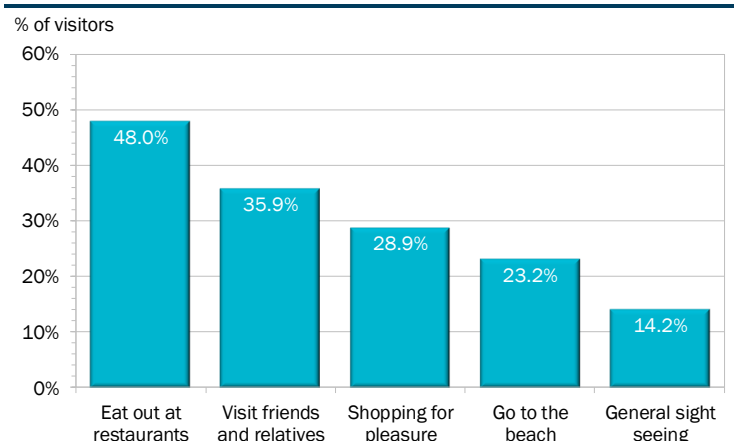
Market share

The sub-region received 8.9% of daytrips to regional NSW. Compared to YE Sep 12, the share was down by 0.5% pts.

Main purpose of trip

'Holiday or leisure' (53.0%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (32.3%) and 'business' (5.4%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' declined by 5.9% while 'VFR' grew by 10.4% and 'business' fell by 57.2%*.

Activities



Expenditure (7)

Domestic daytrip visitors spent \$347 million in the sub-region - up by 15.1% on YE Sep 12. On average, they spent \$119 per trip to the sub-region - up by 27.2% on YE Sep 12.

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