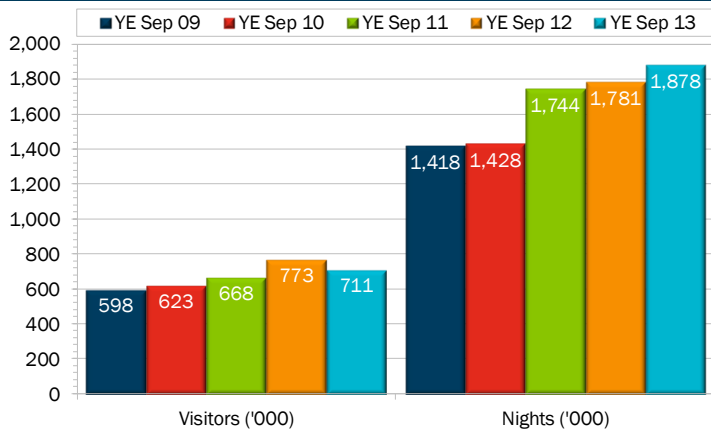


Domestic Overnight Travel (1)

Visitors and nights



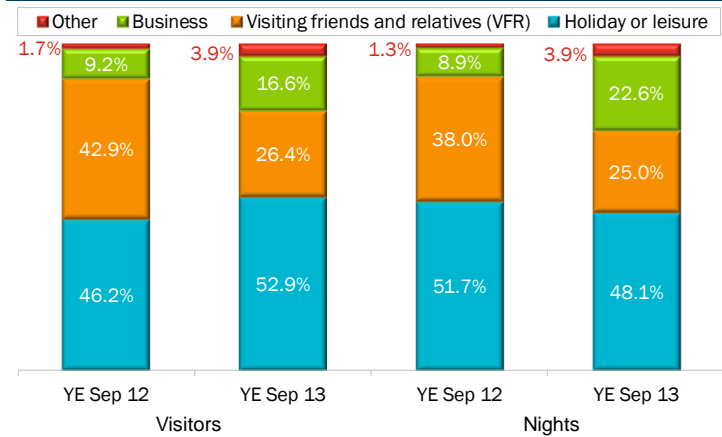
Blue Mountains received 711,000 domestic overnight visitors – down by 8.0% on YE Sep 12. Visitors spent nearly 1.9 million nights in the region - up by 5.4% on YE Sep 12.

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 region received 3.9% of visitors and 3.0% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was down by 0.6% pts and the share of nights was unchanged.

Purpose of visit to the region



'Holiday or leisure' (52.9%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (26.4%) and 'business' (16.6%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' grew by 5.3% while 'VFR' declined by 43.4%* and 'business' increased by 66.2%*.

'Holiday or leisure' (48.1%) was the largest purpose in terms of nights in the region, followed by 'VFR' (25.0%) and 'business' (22.6%). Compared to YE Sep 12, nights spent for 'holiday or leisure' declined by 1.8% and 'VFR' decreased by 30.6% while 'business' grew by 167%*.

Accommodation

'Friends or relatives property' (27.1%) was the most popular accommodation used for nights in the region, followed by 'standard hotel, motor inn, below 4 star' (21.0%) and 'rented house, apartment, flat or unit' (20.3%).

Blue Mountains includes Katoomba, Leura, Lithgow, Megalong Valley, Springwood.

* 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	37.4%	28.7%	33.7%	27.4%
Sydney	48.6%	54.9%	47.9%	54.6%
Total intrastate	86.0%	83.5%	81.6%	81.9%
Victoria	4.8%	5.3%	6.3%	5.9%
Queensland	4.7%	3.9%	6.1%	4.4%
ACT	1.9%	3.8%	2.1%	2.6%
Other interstate	2.5%	3.2%	3.8%	5.1%
Total interstate	14.0%	16.6%	18.4%	18.1%

Sydney (54.9%) was the largest source of visitors to the region, followed by regional NSW (28.7%) and Victoria (5.3%). Compared to YE Sep 12, the regional NSW source market declined by 29.4%* while Sydney grew by 3.7%. Over the same period, Victoria grew by 2.7% while Queensland decreased by 22.2% and the ACT increased by 80.0%.

Sydney (54.6%) was the largest source market in terms of nights in the region, followed by regional NSW (27.4%) and Victoria (5.9%). Compared to YE Sep 12, nights spent by visitors from regional NSW declined by 14.5% while nights from Sydney grew by 20.2%. Over the same period, nights by Victorians declined by 0.9% and Queensland nights decreased by 23.9% while nights by visitors from the ACT grew by 28.9%.

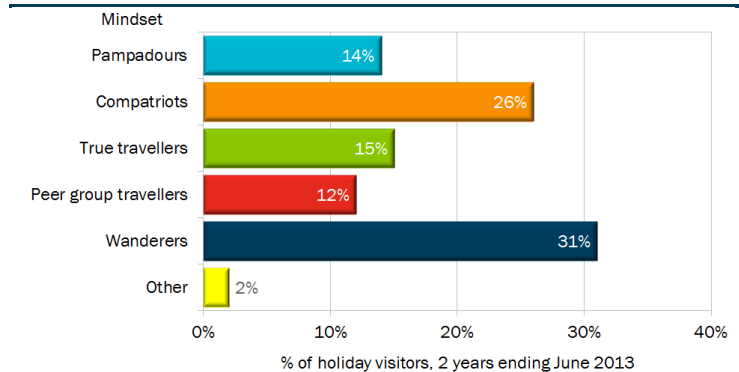
All transport

'Private or company vehicle' (81.9%) was the most popular form of transport used by visitors to the region, followed by 'railway' (6.2%) and 'air transport' (5.5%).

Activities

'Eat out at restaurants' (64.8%) was the most popular activity undertaken by visitors to the region, followed by 'bushwalking or rainforest walks' (42.5%) and 'visit friends and relatives' (34.2%).

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 \$327 million in the region - up by 24.2% on YE Sep 12. On average, visitors spent \$174 per night in the region - up by 17.8% on YE Sep 12.

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

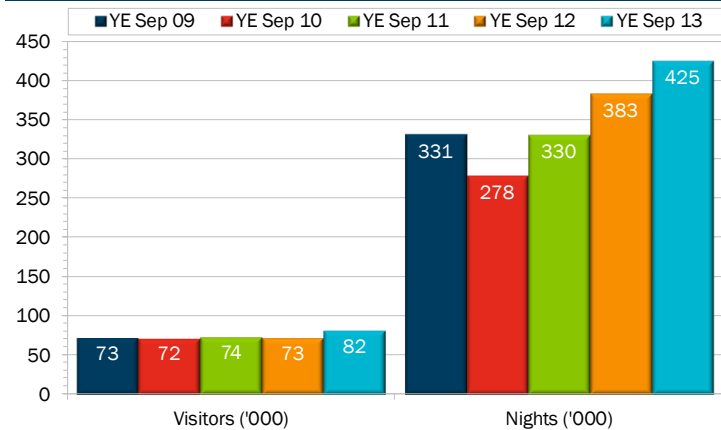
Travel to Blue Mountains

Year ended September 2013

Total visitors ('000)	3,027
Total nights ('000)	2,303
- domestic nights	81.5%
- international nights	18.5%
Total expenditure (million)	\$544

International Overnight Travel (4)

Visitors and nights



Blue Mountains received 81,800 international overnight visitors - up by 12.0% on YE Sep 12. Visitors spent 425,000 nights in the region - up by 11.1% 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 region received 13.9% of visitors and 3.9% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was up by 1.3 pts and the share of nights was up by 0.4% pts.

Purpose of visit to the region

'Holiday / pleasure' (85.7%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (9.1%) and 'business' (3.0%). Compared to YE Sep 12, visitors who travelled for 'holiday / pleasure' grew by 11.2% while 'VFR' declined by 11.6% and 'business' increased by 68.7%.

Origin - share of visitors to the region

Share of international visitors to Blue Mountains							
Rank	Market	YE Sep 12	YE Sep 13	Rank	Market	YE Sep 12	YE Sep 13
1	United Kingdom	21.8%	16.8%	12	Japan	2.2%	3.0%
2	USA	9.1%	11.5%	13	Switzerland	2.3%	3.0%
3	Germany	10.8%	9.6%	14	Middle East & Nth Africa	0.6%	1.6%
4	New Zealand	8.5%	7.3%	15	Italy	1.8%	1.5%
5	Taiwan	4.4%	6.2%	16	Malaysia	2.8%	1.3%
6	Canada	5.1%	5.1%	17	Korea	0.5%	1.3%
7	France	4.2%	5.0%	18	India	1.1%	1.1%
8	Mainland China & HK	6.0%	4.5%	19	Indonesia	0.7%	0.9%
	Mainland China	4.6%	3.7%	20	Thailand	0.1%	0.7%
	Hong Kong	1.3%	0.8%	21	Ireland	1.3%	0.6%
9	Scandinavia	2.3%	4.5%		Other Asia	0.9%	0.3%
10	Singapore	2.4%	4.0%		Other Europe	4.6%	5.0%
11	Netherlands	2.7%	3.2%		Other Countries	3.8%	2.0%

The UK (16.8%) was the region's largest source of visitors.

Accommodation

'Home of friend or relative' (30.1%) was the most popular form of accommodation used for nights in the region, followed by 'backpacker / hostel' (14.2%).

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

International overnight visitors spent \$36 million in the region. On average, visitors spent \$84 per night in the region.

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

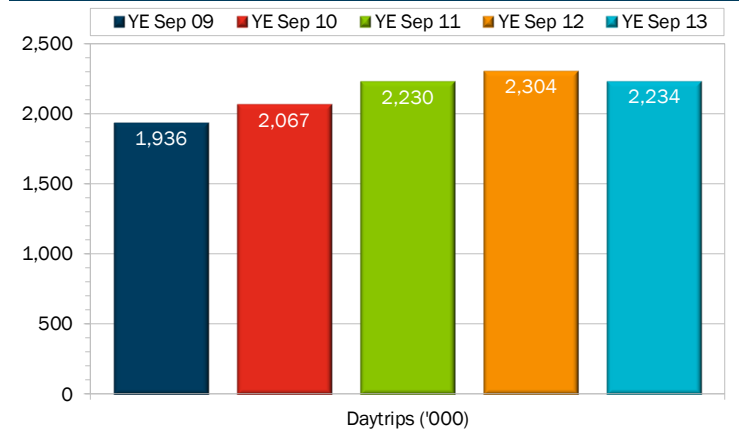
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel (6)

Daytrips



Blue Mountains received over 2.2 million domestic daytrip visitors - down by 3.0% 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.

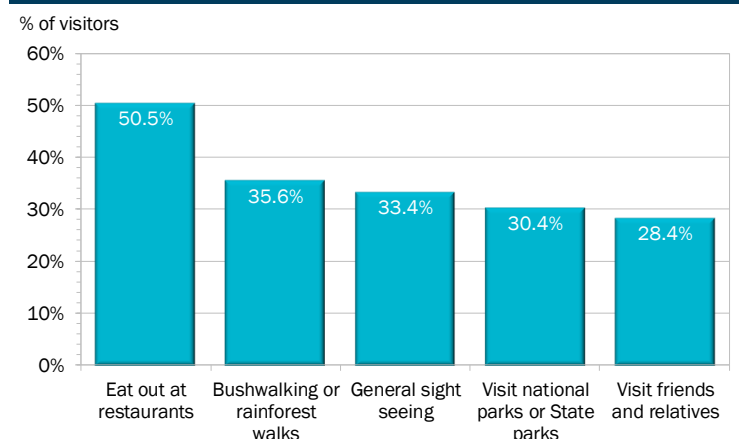
Market share

The region received 6.8% of daytrips to regional NSW. Compared to YE Sep 12, the share was up by 0.1% pt.

Main purpose of trip

'Holiday or leisure' (65.0%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (25.5%) and 'business' (4.3%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' grew by 15.0% while 'VFR' decreased by 10.4% and 'business' declined by 68.3%*.

Activities



Expenditure (7)

Domestic daytrip visitors spent \$182 million in the region - down by 27.3% on YE Sep 12. On average, they spent \$81 per trip to the region - down by 25.1% 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