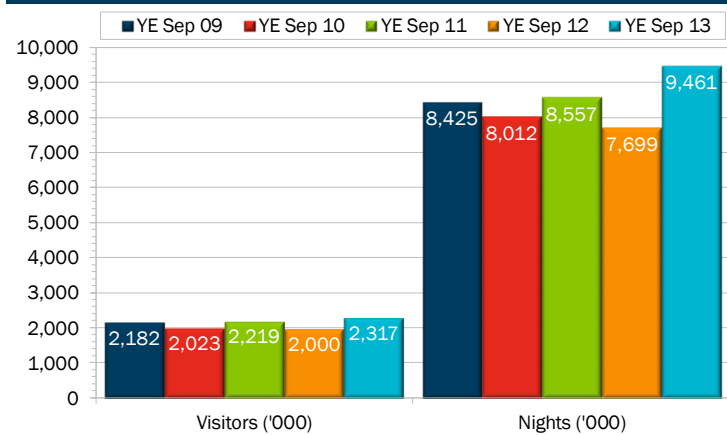


Domestic Overnight Travel (1)

Visitors and nights



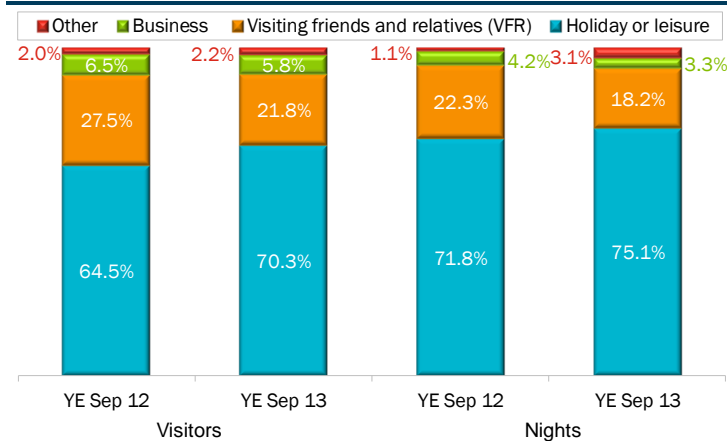
South Coast sub-region received over 2.3 million domestic overnight visitors - up by 15.9%* on YE Sep 12. Visitors spent nearly 9.5 million nights in the sub-region - up by 22.9%* on YE Sep 12.

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 12.8% of visitors and 14.9% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was up by 1.1% pts and the share of nights was up by 2.0% pts.

Purpose of visit to the sub-region



'Holiday or leisure' (70.3%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (21.8%) and 'business' (5.8%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' grew by 26.4%* while 'VFR' declined by 8.2% and 'business' increased by 3.9%.

'Holiday or leisure' (75.1%) was the largest purpose in terms of nights in the sub-region, followed by 'VFR' (18.2%) and 'business' (3.3%). Compared to YE Sep 12, nights spent for 'holiday or leisure' grew by 28.5%* and 'VFR' increased by 0.1% while 'business' decreased by 4.0%.

Accommodation

'Friends or relatives property' (29.4%) was the most popular accommodation used for nights in the sub-region, followed by 'caravan park or commercial camping ground' (28.1%) and 'rented house, apartment, flat or unit' (14.7%).

Origin

| Origin | Share of visitors | | Share of nights | |
|------------------|-------------------|-----------|-----------------|-----------|
| | YE Sep 12 | YE Sep 13 | YE Sep 12 | YE Sep 13 |
| Regional NSW | 28.6% | 27.8% | 25.8% | 23.9% |
| Sydney | 43.4% | 37.5% | 44.0% | 34.8% |
| Total intrastate | 72.0% | 65.3% | 69.8% | 58.7% |
| Victoria | 10.3% | 12.0% | 15.1% | 16.4% |
| Queensland | 1.3% | 2.9% | 2.0% | 4.4% |
| ACT | 14.9% | 18.2% | 10.3% | 17.8% |
| Other interstate | 1.7% | 1.6% | 2.8% | 2.7% |
| Total interstate | 28.1% | 34.7% | 30.2% | 41.3% |

Sydney (37.5%) was the largest source of visitors to the sub-region, followed by regional NSW (27.8%) and the ACT (18.2%). Compared to YE Sep 12, the regional NSW source market grew by 12.6% and Sydney increased by 0.1%. Over the same period, Victoria grew by 35.0%* and Queensland increased by 172%* while the ACT grew by 42.1%*.

Sydney (34.8%) was the largest source market in terms of nights in the sub-region, followed by regional NSW (23.9%) and the ACT (17.8%). Compared to YE Sep 12, nights spent by visitors from regional NSW grew by 13.7% while nights from Sydney decreased by 2.9%. Over the same period, nights by Victorians grew by 33.9%* and Queensland nights increased by 174%* while nights by visitors from the ACT grew by 112%*.

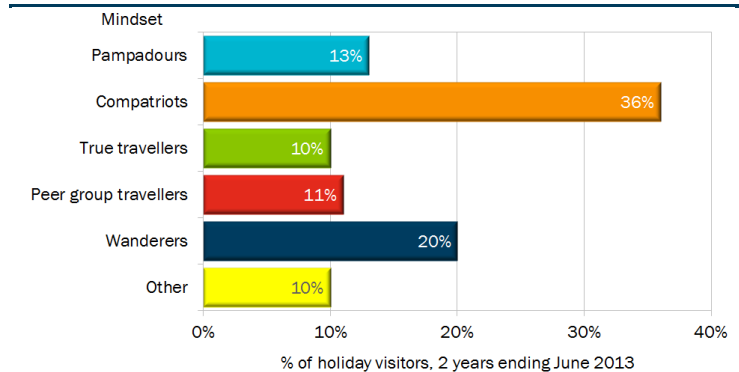
All transport

'Private or company vehicle' (93.7%) was the most popular form of transport used by visitors to the sub-region, followed by 'air transport' (1.5%) and 'bus or coach' (1.3%).

Activities

'Eat out at restaurants' (56.1%) was the most popular activity undertaken by visitors to the sub-region, followed by 'go to the beach' (53.3%) and 'visit friends and relatives' (39.0%).

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 \$1.2 billion in the sub-region - up by 27.5%* on YE Sep 12. On average, visitors spent \$128 per night in the sub-region - up by 3.7% on YE Sep 12.

(3) Estimated using data from TRA's modelled domestic overnight visitor expenditure in Australia's regions, YE Sep 13

South Coast sub-region covers Nowra to Eden including Jarvis Bay, Ulladulla, Batemans Bay, Moruya, Narooma, Bega and Merimbula.

* The percentage change is statistically significant.

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

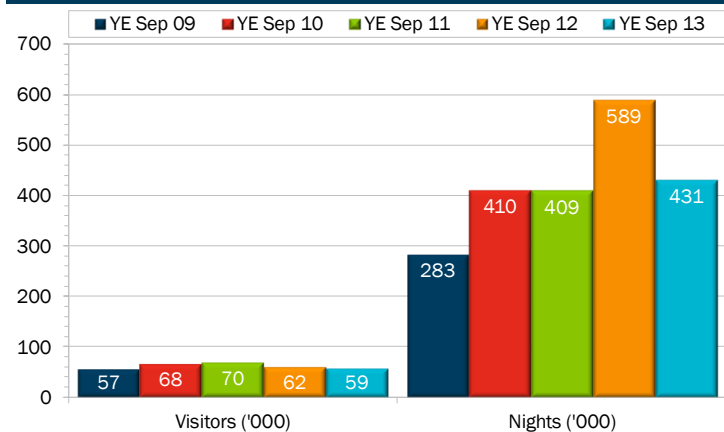
Travel to South Coast sub-region

Year ended September 2013

| | |
|-----------------------------|---------|
| Total visitors ('000) | 4,681 |
| Total nights ('000) | 9,892 |
| - domestic nights | 95.6% |
| - international nights | 4.4% |
| Total expenditure (million) | \$1,453 |

International Overnight Travel (4)

Visitors and nights



South Coast sub-region received 58,800 international overnight visitors - down by 4.5% on YE Sep 12. Visitors spent 430,500 nights in the region - down by 26.9% 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 10.0% of visitors and 3.9% of nights in regional NSW. Compared to YE Sep 12, the share of visitors was down by 0.7% pts and share of nights was down by 1.4% pts.

Purpose of visit to the sub-region

'Holiday / pleasure' (77.1%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (17.5%) and 'business' (3.8%). Compared to YE Sep 12, visitors who travelled for 'holiday / pleasure' declined by 1.3% and 'VFR' fell by 24.5% while 'business' grew by 14.7%.

Origin - share of visitors to the sub-region

| Share of international visitors to South Coast sub-region | | | | | | | |
|---|--------------------------|-----------|-----------|------|-----------------|-----------|-----------|
| Rank | Market | YE Sep 12 | YE Sep 13 | Rank | Market | YE Sep 12 | YE Sep 13 |
| 1 | United Kingdom | 26.4% | 19.2% | 13 | Singapore | 1.6% | 2.4% |
| 2 | USA | 13.8% | 11.7% | 14 | Italy | 2.8% | 1.9% |
| 3 | Germany | 11.7% | 10.5% | 15 | India | 0.7% | 1.7% |
| 4 | New Zealand | 7.7% | 10.5% | 16 | Malaysia | 0.5% | 1.5% |
| 5 | Switzerland | 2.6% | 4.6% | 17 | Ireland | 1.9% | 1.4% |
| 6 | France | 6.0% | 4.2% | 18 | Japan | 2.2% | 1.2% |
| 7 | Korea | 1.5% | 3.5% | 19 | Indonesia | 0.4% | 1.1% |
| 8 | Netherlands | 2.9% | 3.4% | 20 | Thailand | 0.7% | 1.0% |
| 9 | Canada | 3.7% | 2.8% | 21 | Taiwan | 0.0% | 0.1% |
| 10 | Scandinavia | 4.4% | 2.7% | | | | |
| 11 | Middle East & Nth Africa | 0.5% | 2.6% | | | | |
| 12 | Mainland China & HK | 1.3% | 2.4% | | Other Asia | 0.4% | 2.3% |
| | Mainland China | 1.0% | 1.8% | | Other Europe | 3.0% | 5.2% |
| | Hong Kong | 0.3% | 0.6% | | Other Countries | 3.3% | 1.9% |

Accommodation

'Home of friend or relative' (43.0%) was the most popular form of accommodation used for nights in the sub-region, followed by 'rented house / apartment / unit / flat' (27.1%).

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

International visitors spent \$34 million in the sub-region - down by 17.3% on YE Sep 12. On average, visitors spent \$79 per night in the sub-region - up by 13.1% on YE Sep 12.

(5) Estimated using data from TRA's modelled international overnight visitor expenditure in Australia's regions, YE Sep 13.

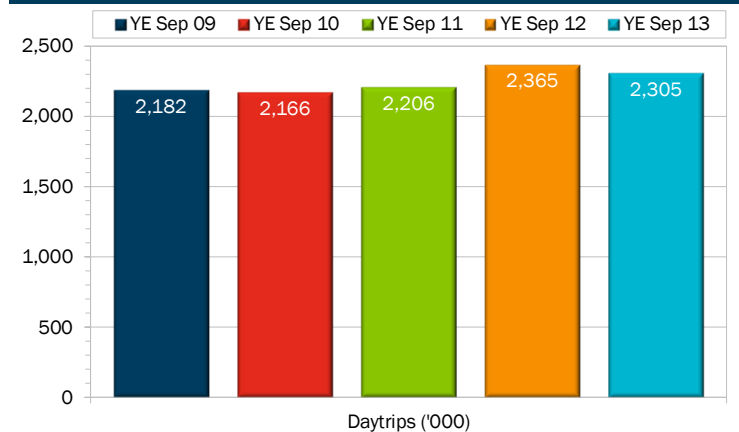
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel (6)

Daytrips



South Coast sub-region received over 2.3 million domestic daytrip visitors - down by 2.5% 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.

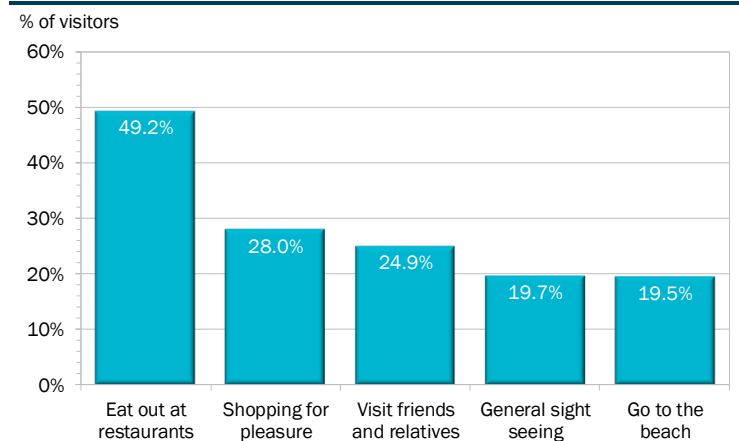
Market share

The sub-region received 7.0% 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' (56.2%) was the largest purpose for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (20.9%) and 'health-related' (7.9%). Compared to YE Sep 12, visitors who travelled for 'holiday or leisure' grew by 6.8% while 'VFR' declined by 17.4% and 'health-related' increased by 40.0%.

Activities



Expenditure (7)

Domestic daytrip visitors spent \$207 million in the sub-region - up by 10.0% on YE Sep 12. On average, they spent \$90 per trip to the sub-region - up by 12.8% on YE Sep 12.

(7) Estimated using data from TRA's modelled domestic day visitor expenditure in Australia's regions, YE Sep 13

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

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