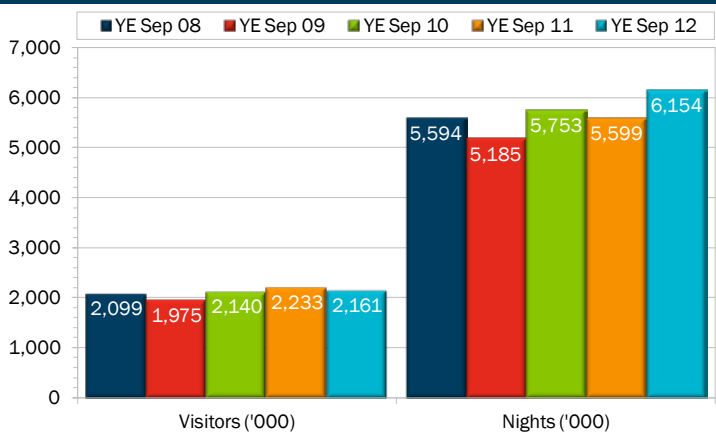


Domestic Overnight Travel (1)

Visitors and nights



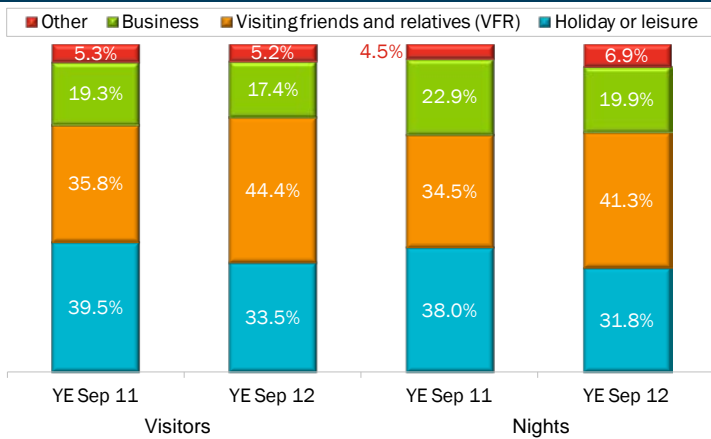
The Hunter received nearly 2.2 million domestic overnight visitors - down by 3.2% on YE Sep 11. Visitors spent nearly 6.2 million nights in the region - up by 9.9% on YE Sep 11.

Note: The number of domestic overnight trips to regional New South Wales increased by 1.5 percent on last year and by 1.7 percent compared to four years ago.

Market share

The region received 12.3% of visitors and 10.1% of nights in regional NSW. Compared to YE Sep 11, the share of visitors was down by 0.6% pts and the share of nights was up by 0.8% pts.

Purpose of visit to the region



'Visiting friends and relatives (VFR)' (44.4%) was the largest purpose for visitors to the region, followed by 'holiday or leisure' (33.5%) and 'business' (17.4%). Compared to YE Sep 11, visitors who travelled for 'holiday or leisure' declined by 18.1%* while 'VFR' grew by 20.0%* and 'business' fell by 12.8%.

'VFR' (41.3%) was the largest purpose in terms of nights in the region, followed by 'holiday or leisure' (31.8%) and 'business' (19.9%). Compared to YE Sep 11, nights spent for 'holiday or leisure' declined by 8.0% while 'VFR' grew by 31.6%* and 'business' decreased by 4.8%.

Accommodation

'Friends or relatives property' (45.9%) was the most popular accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (15.1%) and 'standard hotel, motor inn, below 4 star' (13.6%).

The Hunter includes Barrington Tops, Hunter Valley, Lake Macquarie, Newcastle, Singleton.

* The percentage change is statistically significant.

(1) Source: National Visitor Survey (NVS), YE Sep 12, Tourism Research Australia (TRA)

Origin

| Origin | Share of visitors | | Share of nights | |
|------------------|-------------------|-----------|-----------------|-----------|
| | YE Sep 11 | YE Sep 12 | YE Sep 11 | YE Sep 12 |
| Regional NSW | 44.3% | 45.5% | 44.0% | 43.2% |
| Sydney | 37.5% | 37.7% | 33.2% | 28.8% |
| Total intrastate | 81.9% | 83.2% | 77.2% | 71.9% |
| Victoria | 3.6% | 6.1% | 3.5% | 7.8% |
| Queensland | 8.9% | 7.1% | 11.1% | 14.9% |
| ACT | 2.5% | 1.4% | 2.3% | 1.8% |
| Other interstate | 3.1% | 2.2% | 6.0% | 3.6% |
| Total interstate | 18.1% | 16.8% | 22.8% | 28.1% |

Regional NSW (45.5%) was the largest source of visitors to the region, followed by Sydney (37.7%) and Queensland (7.1%). Compared to YE Sep 11, the regional NSW source market declined by 0.7% and Sydney decreased by 2.9%. Over the same period, Victoria grew by 63.0%* while Queensland declined by 22.6% and the ACT decreased by 45.5%.

Regional NSW (43.2%) was the largest source market in terms of nights in the region, followed by Sydney (28.8%) and Queensland (14.9%). Compared to YE Sep 11, nights spent by visitors from regional NSW grew by 7.7% while nights from Sydney declined by 4.7%. Over the same period, nights by Victorians grew by 144%* and Queensland nights increased by 47.9%* while nights by visitors from the ACT fell by 10.3%.

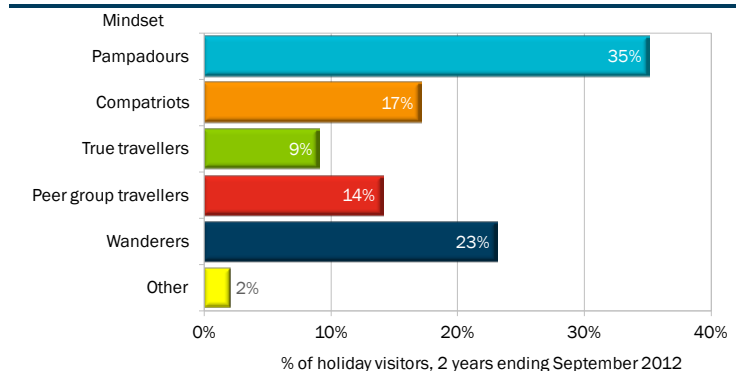
All transport

'Private or company vehicle' (86.0%) was the most popular form of transport used by visitors to the region, followed by 'air transport' (7.2%) and 'railway' (3.4%).

Activities

'Eat out at restaurants' (51.9%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (51.7%) and 'general sightseeing' (21.8%).

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 Sep 12

Expenditure (incl airfares and transport costs) (3)

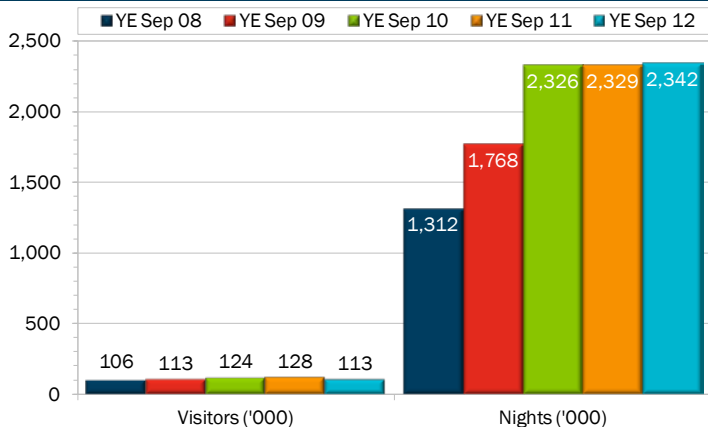
Domestic overnight visitors spent \$801 million in the region - down by 10.8% on YE Sep 11. On average, visitors spent \$130 per night in the region - down by 19.0% on YE Sep 11.

(3) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Sep 11 and YE Sep 12, TRA

| | |
|-----------------------------|---------|
| Total visitors ('000) | 7,589 |
| Total nights ('000) | 8,496 |
| - domestic nights | 72.4% |
| - international nights | 27.6% |
| Total expenditure (million) | \$1,492 |

International Overnight Travel (4)

Visitors and nights



The Hunter received 113,300 international overnight visitors - down by 11.4%* on YE Sep 11. Visitors spent over 2.3 million nights in the region - up by 0.6% on YE Sep 11.

Note: The number of overnight trips to regional New South Wales by international visitors decreased by 3.2 percent on last year and by 5.4 percent* compared to four years ago.

Market share

The region received 19.6% of visitors and 21.4% of nights in regional NSW. Compared to YE Sep 11, the share of visitors was down by 1.8% pts and share of nights was down by 0.2% pts.

Purpose of visit to the region

'Holiday / pleasure' (52.6%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (30.5%) and 'business' (8.7%). Compared to YE Sep 11, visitors who travelled for 'holiday / pleasure' declined by 19.8%* while 'VFR' grew by 7.6% and 'business' decreased by 24.9%.

Origin - share of visitors to the region

| Share of international visitors to The Hunter | | | | | | | |
|---|---------------------|-----------|-----------|------|--------------------------|-----------|-----------|
| Rank | Market | YE Sep 11 | YE Sep 12 | Rank | Market | YE Sep 11 | YE Sep 12 |
| 1 | United Kingdom | 19.4% | 16.9% | 12 | Switzerland | 1.4% | 2.0% |
| 2 | New Zealand | 10.7% | 13.8% | 13 | Japan | 2.0% | 1.8% |
| 3 | USA | 11.7% | 10.2% | 14 | Indonesia | 1.4% | 1.7% |
| 4 | Germany | 7.0% | 6.8% | 15 | Middle East & Nth Africa | 2.2% | 1.6% |
| 5 | Mainland China & HK | 6.5% | 5.7% | 16 | Korea | 1.6% | 1.5% |
| | Mainland China | 4.6% | 4.1% | 17 | Taiwan | 0.8% | 1.4% |
| | Hong Kong | 1.9% | 1.6% | 18 | Italy | 0.6% | 1.3% |
| 6 | France | 2.2% | 3.9% | 19 | Thailand | 1.5% | 1.1% |
| 7 | Canada | 4.5% | 3.7% | 20 | Netherlands | 3.4% | 1.1% |
| 8 | Scandinavia | 2.9% | 3.6% | 21 | India | 1.5% | 0.6% |
| 9 | Singapore | 4.1% | 3.1% | | Other Asia | 1.0% | 1.7% |
| 10 | Malaysia | 1.8% | 2.9% | | Other Europe | 3.5% | 3.8% |
| 11 | Ireland | 3.5% | 2.4% | | Other Countries | 4.7% | 7.4% |

Accommodation

'Rented house / apartment / unit / flat' (38.2%) was the most popular form of accommodation used for nights in the region, followed by 'home of friend or relative' (28.9%).

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

International overnight visitors spent \$169 million in the region - up by 23.1% on YE Sep 11. On average, visitors spent \$72 per night in the region - up by 22.0% on YE Sep 11.

(5) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Sep 11 and YE Sep 12, TRA.

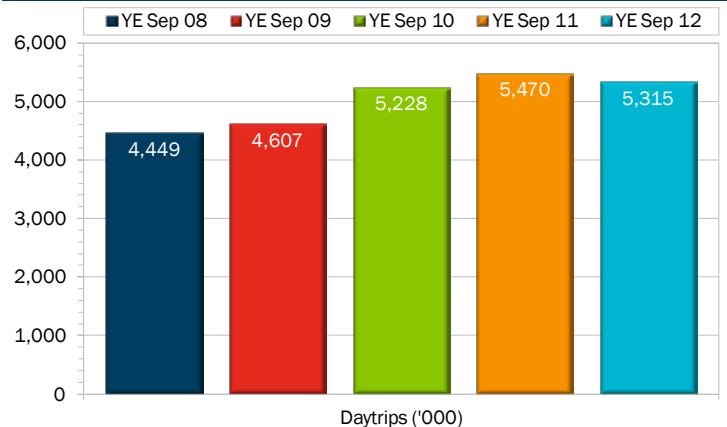
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(4) Source: International Visitor Survey (IVS), YE Sep 12, TRA

Domestic Daytrip Travel (6)

Daytrips



The Hunter received over 5.3 million domestic daytrip visitors - down by 2.8% on YE Sep 11.

Note: The number of domestic daytrips to regional New South Wales increased by 6.4 percent* on last year and by 20.6 percent* compared to four years ago.

Market share

The region received 15.4% of daytrips to regional NSW. Compared to YE Sep 11, the share was down by 1.5% pts.

Main purpose of trip

'Holiday or leisure' (35.9%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.1%) and 'business' (15.5%). Compared to YE Sep 11, visitors who travelled for 'holiday or leisure' declined by 17.2%* while 'VFR' grew by 1.3% and 'business' decreased by 3.4%.

Activities

'Eat out at restaurants' (39.4%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (34.3%) and 'shopping for pleasure' (18.9%).

Expenditure (7)

Domestic daytrip visitors spent \$522 million in the region - up by 7.4% on YE Sep 11. On average, they spent \$98 per trip to the region - up by 10.3% on YE Sep 11.

(7) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Sep 11 and YE Sep 12, TRA

Notes and further information

Enhancements to the NVS and the IVS were introduced in 2012. Tourism region boundaries have changed in both surveys with the introduction of the new Australian Statistical Geography Standard.

The NVS has new population benchmarks and the reporting of business expenditure has been improved.

The categories of education and employment in the IVS are now benchmarked separately to the overseas arrivals data collected by the Department of Immigration and Citizenship.

Please see www.destinationnsw.com.au for more information on the enhancements to the IVS and NVS, as well as profiles on travel to the other regions in NSW and information on international and domestic travel to the State.

(6) Source: NVS, YE Sep 12, TRA