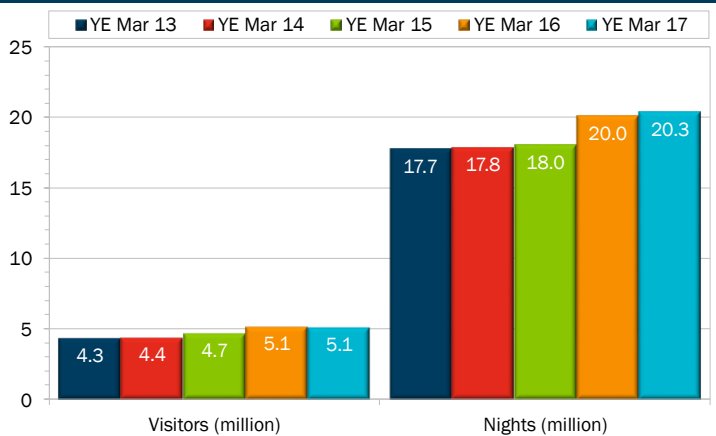


Domestic Overnight Travel¹

Visitors and nights



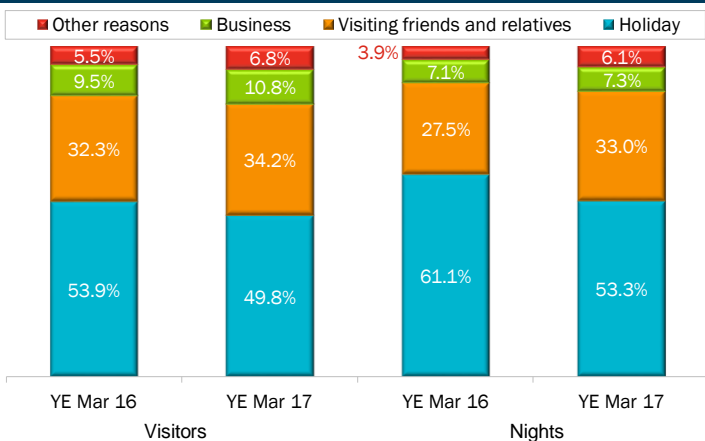
North Coast NSW received nearly 5.1 million domestic overnight visitors - down by 1.2% on YE Mar 16. Visitors spent over 20.3 million nights in the region - up by 1.6% on YE Mar 16.

Note: The number of domestic overnight trips to regional New South Wales increased by 2.3 percent on last year and by 15.7 percent* compared to four years ago.

Market share

The region received 24.5% of visitors and 28.9% of nights in regional NSW. Compared to YE Mar 16, the share of visitors was down by 0.9% pts and the share of nights was down by 0.8% pts.

Purpose of visit to North Coast NSW



'Holiday' (49.8%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (34.2%) and 'business' (10.8%). Compared to YE Mar 16, visitors who travelled for 'holiday' declined by 8.6%* while 'VFR' grew by 4.5% and 'business' increased by 11.9%.

'Holiday' (53.3%) was the largest purpose in terms of nights in the region, followed by 'VFR' (33.0%) and 'business' (7.3%). Compared to YE Mar 16, nights spent for 'holiday' declined by 11.4% while 'VFR' grew by 22.2%* and 'business' increased by 4.8%.

Accommodation in North Coast NSW

'Friends or relatives property' (33.3%) was the most popular accommodation used for nights in the region, followed by 'caravan park or commercial camping ground' (19.7%) and 'rented house, apartment, flat or unit' (13.6%).

North Coast NSW region covers Great Lakes to Tweed Heads including Forster, Taree, Wingham, Port Macquarie, South West Rocks, Macksville, Bellingen, Coffs Harbour, Grafton, Ballina, Lismore, Byron Bay and Murwillumbah.

* The percentage change is statistically significant.

Origin

| Origin | Share of visitors | | Share of nights | |
|------------------|-------------------|-----------|-----------------|-----------|
| | YE Mar 16 | YE Mar 17 | YE Mar 16 | YE Mar 17 |
| Regional NSW | 36.3% | 35.5% | 34.0% | 33.4% |
| Sydney | 22.7% | 24.5% | 24.4% | 25.8% |
| Total intrastate | 59.0% | 59.9% | 58.4% | 59.2% |
| Queensland | 31.7% | 30.8% | 28.1% | 25.7% |
| Victoria | 5.7% | 5.7% | 7.2% | 9.8% |
| ACT | 1.3% | 1.2% | 1.4% | 1.4% |
| Other interstate | 2.4% | 2.4% | 4.9% | 3.9% |
| Total interstate | 41.0% | 40.1% | 41.6% | 40.8% |

Regional NSW (35.5%) was the largest source of visitors to the region, followed by Queensland (30.8%) and Sydney (24.5%). Compared to YE Mar 16, the regional NSW source market declined by 3.5% while Sydney grew by 6.4%. Over the same period, Queensland declined by 4.0% and Victoria decreased by 1.7% while the ACT fell by 4.4%.

Regional NSW (33.4%) was the largest source market in terms of nights in the region, followed by Sydney (25.8%) and Queensland (25.7%). Compared to YE Mar 16, nights spent by visitors from regional NSW declined by 0.5% while nights from Sydney grew by 7.7%. Over the same period, nights by Queenslanders declined by 7.2% while Victorian nights grew by 39.0%* and nights by visitors from the ACT increased by 3.1%.

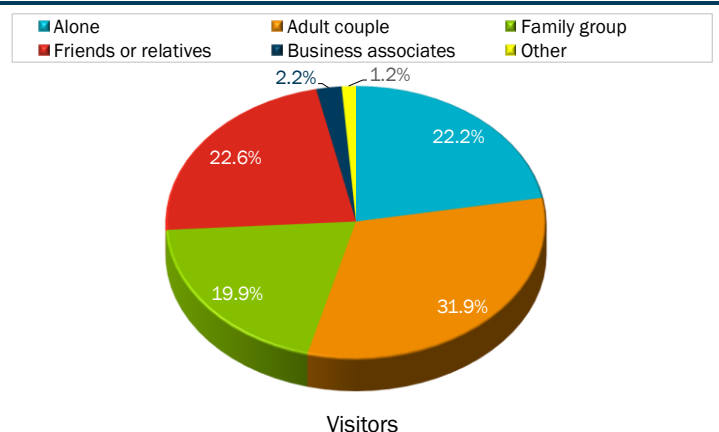
Top activities in North Coast NSW

'Eat out, dine at a restaurant or cafe' (65.0%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (49.4%) and 'visit friends and relatives' (44.3%).

Age groups

'15 to 29 years' (22.3%) was the largest age group of visitors to the region, followed by '50 to 59 years' (17.8%) and '60 to 69 years' (17.3%).

Travel party



'Adult couple' (31.9%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (22.6%) and 'alone' (22.2%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent nearly \$2.9 billion in the region - up by 2.6% on YE Mar 16. On average, they spent \$140 per night - up by 1.0% on YE Mar 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 17.

Travel to North Coast NSW region

Year ended March 2017

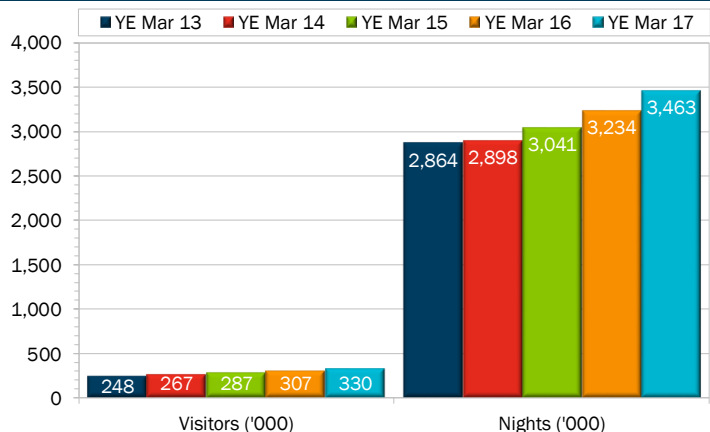
For the period of April 2016 to March 2017

Sources: (1) NVS & (2) IVS, YE Mar 17, TRA - unless otherwise specified.

| | YE Mar 17 | YE on YE growth | Share of region | | | Share of regional NSW | Rank in regional NSW |
|--------------------------|-----------|-----------------|-------------------------|--------------------|-------------------|-----------------------|----------------------|
| | | | international overnight | domestic overnight | domestic daytrips | | |
| Total visitors (million) | 11.9 | -1.0% | 2.8% | 42.8% | 54.4% | 20.5% | 1 |
| Total nights (million) | 23.8 | 2.3% | 14.6% | 85.4% | 0.0% | 28.1% | 1 |
| Total spend (billion) | \$3.7 | 0.5% | 5.4% | 78.0% | 16.6% | 24.6% | 1 |

International Overnight Travel²

Visitors and nights



North Coast NSW received 330,100 international overnight visitors - up by 7.7%* on YE Mar 16. Visitors spent nearly 3.5 million nights in the region - up by 7.1% on YE Mar 16.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 9.6 percent* on last year and by 34.3 percent* compared to four years ago.

Market share

The region received 42.3% of visitors and 24.4% of nights in regional NSW. Compared to YE Mar 16, the share of visitors was down by 0.7% pts and the share of nights was up by 0.9% pts.

Purpose of visit to North Coast NSW

'Holiday' (82.1%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (15.8%) and 'business' (2.4%). Compared to YE Mar 16, visitors who travelled for 'holiday' grew by 10.6%* while 'VFR' declined by 1.4% and 'business' increased by 35.8%.

Origin - share of visitors to North Coast NSW

| Rank | Individual market | Share of international visitors to North Coast NSW region | | | | |
|------|-------------------|---|-----------|-----------------------|-----------|-----------|
| | | YE Mar 16 | YE Mar 17 | Origin region | YE Mar 16 | YE Mar 17 |
| 1 | United Kingdom | 23.3% | 20.1% | Europe | 59.7% | 56.4% |
| 2 | Germany | 12.1% | 12.3% | North America | 13.6% | 16.9% |
| 3 | USA | 8.5% | 11.4% | Asia | 10.5% | 11.3% |
| 4 | New Zealand | 10.8% | 9.2% | New Zealand & Oceania | 11.9% | 10.3% |
| 5 | Canada | 5.1% | 5.5% | Other Countries | 4.3% | 5.1% |

The United Kingdom (20.1%) was the region's largest individual source market of visitors, followed by Germany (12.3%) and the USA (11.4%).

Accommodation in North Coast NSW

'Friends or relatives property' (30.5%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (21.3%).

Age groups

'15 to 29 years' (51.6%) was the largest age group of visitors to the region, followed by '30 to 39 years' (17.7%) and '50 to 59 years' (10.2%).

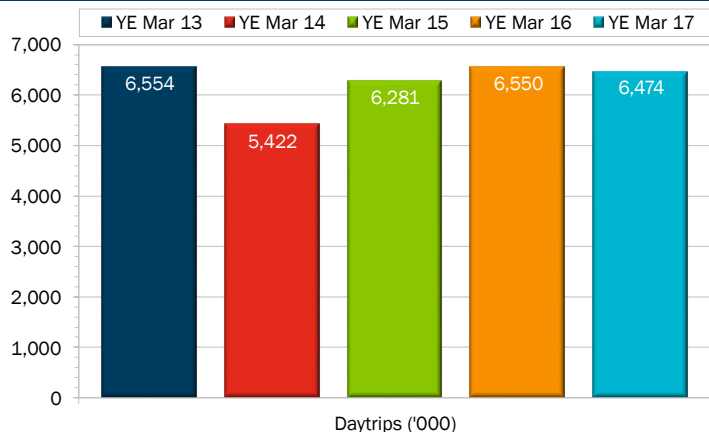
Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent \$198 million in the region - up by 1.0% on YE Mar 16. On average, they spent \$57 per night - down by 5.6% on YE Mar 16.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Mar 17.

Domestic Daytrip Travel⁴

Daytrips



North Coast NSW received nearly 6.5 million domestic daytrip visitors - down by 1.2% on YE Mar 16.

Note: The number of domestic daytrips to regional New South Wales increased by 2.3 percent on last year and by 8.4 percent* compared to four years ago.

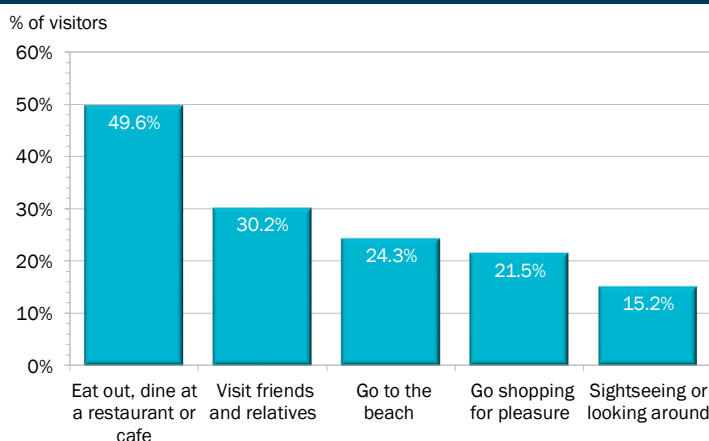
Market share

The region received 17.8% of daytrips to regional NSW. Compared to YE Mar 16, the share was down by 0.6% pts.

Main purpose of trip

'Holiday' (52.2%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (28.4%) and 'business' (6.5%). Compared to YE Mar 16, visitors who travelled for 'holiday' declined by 4.2% while 'VFR' grew by 8.6% and 'business' decreased by 5.7%.

Top activities in North Coast NSW



'Eat out, dine at a restaurant or cafe' (49.6%) was the most popular activity undertaken by visitors to the region.

Expenditure³

Domestic daytrip visitors spent \$607 million in the region - down by 8.5% on YE Mar 16. On average, they spent \$94 per trip - down by 7.5% on YE Mar 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 17.

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.