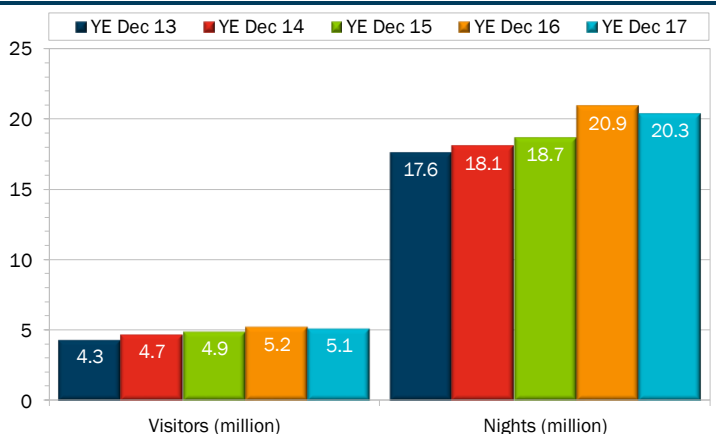


## Domestic Overnight Travel<sup>1</sup>

### Visitors and nights



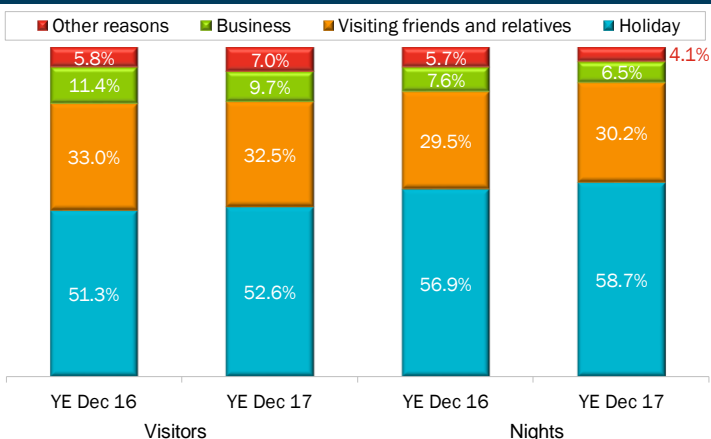
North Coast NSW received over 5.1 million domestic overnight visitors - down by 1.9% on YE Dec 16. Visitors spent over 20.3 million nights in the region - down by 2.7% on YE Dec 16.

Note: The number of domestic overnight trips to regional New South Wales increased by 7.5 percent\* on last year and by 23.7 percent\* compared to four years ago.

### Market share

The region received 22.9% of visitors and 27.7% of nights in regional NSW. Compared to YE Dec 16, the share of visitors was down by 2.2% pts and the share of nights was down by 2.0% pts.

### Purpose of visit to North Coast NSW



'Holiday' (52.6%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.5%) and 'business' (9.7%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 0.5% while 'VFR' declined by 3.5% and 'business' decreased by 16.2%.

'Holiday' (58.7%) was the largest purpose in terms of nights in the region, followed by 'VFR' (30.2%) and 'business' (6.5%). Compared to YE Dec 16, nights spent for 'holiday' grew by 0.4% while 'VFR' declined by 0.4% and 'business' decreased by 16.7%.

### Accommodation in North Coast NSW

'Friends or relatives property' (32.0%) was the most popular accommodation used for nights in the region. 'Caravan park or commercial camping ground' (19.7%) was the 2<sup>nd</sup> most popular accommodation used, followed by 'rented house, apartment, flat or unit' (13.1%).

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 Dec 16	YE Dec 17	YE Dec 16	YE Dec 17
Regional NSW	34.6%	39.7%	32.3%	37.5%
Sydney	24.6%	22.3%	25.6%	24.9%
Total intrastate	59.2%	62.1%	57.9%	62.4%
Queensland	31.4%	28.5%	27.2%	24.5%
Victoria	5.7%	5.8%	9.1%	7.8%
ACT	1.3%	1.2%	1.6%	1.8%
Other interstate	2.4%	2.5%	4.2%	3.5%
Total interstate	40.8%	37.9%	42.1%	37.6%

Regional NSW (39.7%) was the largest source of visitors to the region, followed by Queensland (28.5%) and Sydney (22.3%). Compared to YE Dec 16, the regional NSW source market grew by 12.6%\* while Sydney declined by 10.8%. Over the same period, Queensland declined by 11.2%\* while Victoria was unchanged and the ACT decreased by 15.4%.

Regional NSW (37.5%) was the largest source market in terms of nights in the region, followed by Sydney (24.9%) and Queensland (24.5%). Compared to YE Dec 16, nights spent by visitors from regional NSW grew by 13.0% while nights from Sydney declined by 5.3%. Over the same period, nights by Queenslanders declined by 12.4% and Victorian nights decreased by 17.3% while nights by visitors from the ACT grew by 12.3%.

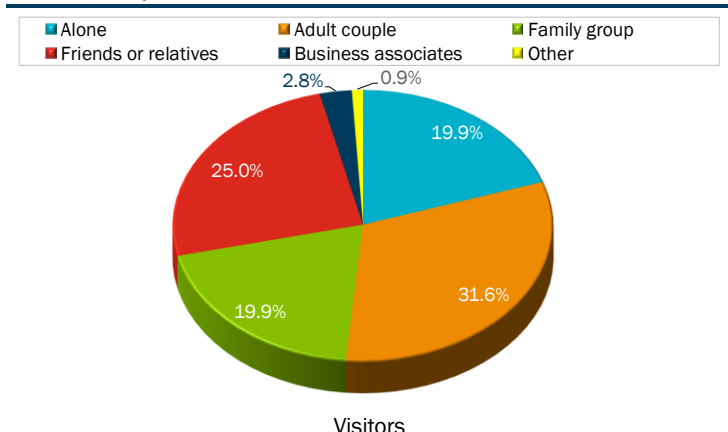
### Top activities in North Coast NSW

'Eat out, dine at a restaurant or cafe' (65.4%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (49.6%) and 'visit friends and relatives' (41.6%).

### Age groups

'15 to 29 years' (21.7%) was the largest age group of visitors to the region, followed by '60 to 69 years' (18.3%) and '30 to 39 years' (17.2%).

### Travel party



'Adult couple' (31.6%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (25.0%) and 'alone' (19.9%).

### Expenditure (incl airfares and transport costs)<sup>3</sup>

Domestic overnight visitors spent over \$3.1 billion in the region - up by 8.4% on YE Dec 16. On average, they spent \$153 per night - up by 11.3% on YE Dec 16.

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

# Travel to North Coast NSW region

Year ended December 2017

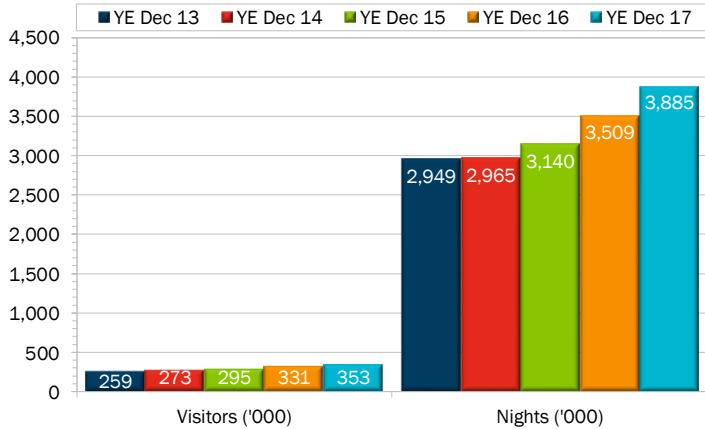
For the period of January 2017 to December 2017

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

	YE Dec 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)	12.4	1.7%	2.8%	41.1%	56.1%	20.4%	1
Total nights (million)	24.2	-0.7%	16.0%	84.0%	0.0%	27.5%	1
Total spend (billion)	\$4.1	10.6%	5.9%	75.8%	18.3%	25.2%	1

## International Overnight Travel<sup>2</sup>

### Visitors and nights



North Coast NSW received 352,700 international overnight visitors - up by 6.6%\* on YE Dec 16. Visitors spent nearly 3.9 million nights in the region - up by 10.7% on YE Dec 16.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 10.8 percent\* on last year and by 43.5 percent\* compared to four years ago.

### Market share

The region received 41.4% of visitors and 26.4% of nights in regional NSW. Compared to YE Dec 16, the share of visitors was down by 1.6% pts and the share of nights was up by 0.2% pts.

### Purpose of visit to North Coast NSW

'Holiday' (81.2%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (17.1%) and 'business' (2.2%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 7.1% and 'VFR' increased by 7.3% while 'business' grew by 4.6%.

### Origin - share of visitors to North Coast NSW

Rank	Individual market	Share of international visitors to North Coast NSW region		Origin region	Share of international visitors to regional NSW	
		YE Dec 16	YE Dec 17		YE Dec 16	YE Dec 17
1	United Kingdom	21.2%	20.2%	Europe	56.9%	56.3%
2	Germany	12.3%	11.0%	North America	16.1%	15.1%
3	New Zealand	9.9%	10.7%	Asia	10.4%	12.2%
4	USA	11.0%	10.0%	New Zealand & Oceania	11.0%	11.6%
5	Canada	5.2%	5.1%	Other Countries	5.6%	4.8%

The United Kingdom (20.2%) was the region's largest individual source market of visitors, followed by Germany (11.0%) and New Zealand (10.7%).

### Accommodation in North Coast NSW

'Friends or relatives property' (30.6%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (24.2%).

### Age groups

'15 to 29 years' (49.3%) was the largest age group of visitors to the region, followed by '30 to 39 years' (16.8%) and '60 to 69 years' (11.2%).

### Expenditure (incl 30% prepaid package expenditure)<sup>4</sup>

International overnight visitors spent \$242 million in the region - up by 21.3% on YE Dec 16. On average, they spent \$62 per night - up by 9.5% on YE Dec 16.

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

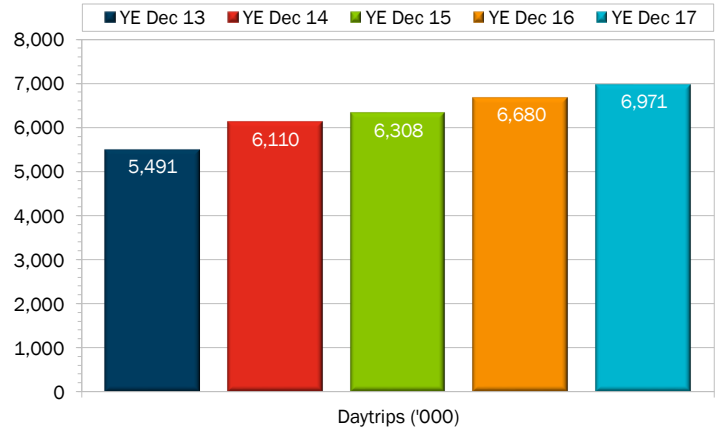
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

## Domestic Daytrip Travel<sup>4</sup>

### Daytrips



North Coast NSW received nearly 7.0 million domestic daytrip visitors - up by 4.4% on YE Dec 16.

Note: The number of domestic daytrips to regional New South Wales increased by 1.5 percent on last year and by 16.1 percent\* compared to four years ago.

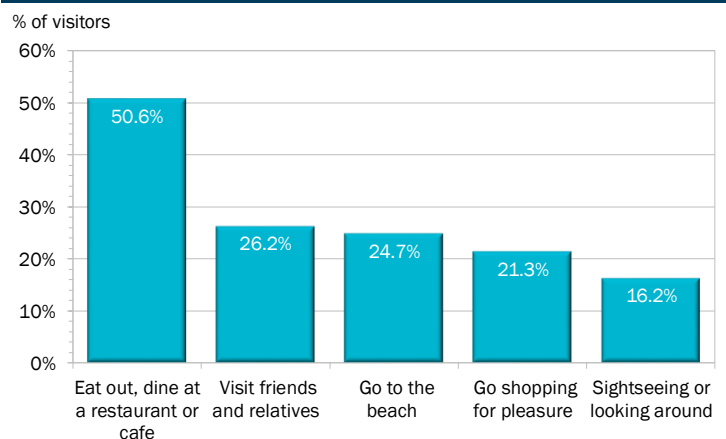
### Market share

The region received 18.5% of daytrips to regional NSW. Compared to YE Dec 16, the share was up by 0.5% pts.

### Main purpose of trip

'Holiday' (55.1%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (22.3%) and 'business' (6.8%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 8.6% while 'VFR' declined by 17.5%\* and 'business' increased by 14.3%.

### Top activities in North Coast NSW



'Eat out, dine at a restaurant or cafe' (50.6%) was the most popular activity undertaken by visitors to the region.

### Expenditure<sup>3</sup>

Domestic daytrip visitors spent \$753 million in the region - up by 17.6% on YE Dec 16. On average, they spent \$108 per trip - up by 12.7% on YE Dec 16.

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

### Further information

Please see [www.destinationnsw.com.au](http://www.destinationnsw.com.au) for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.