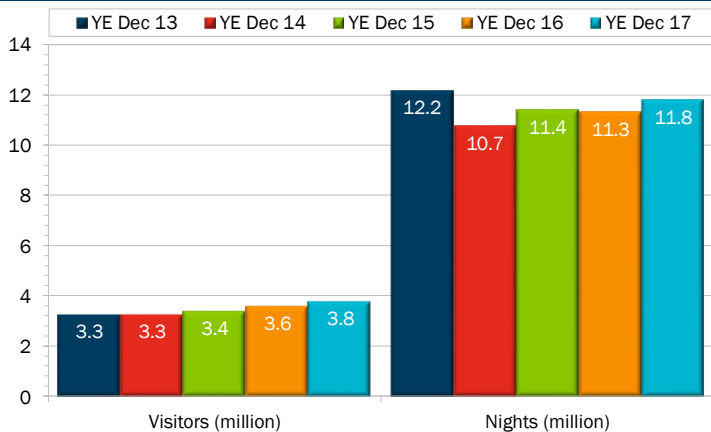


Domestic Overnight Travel¹

Visitors and nights



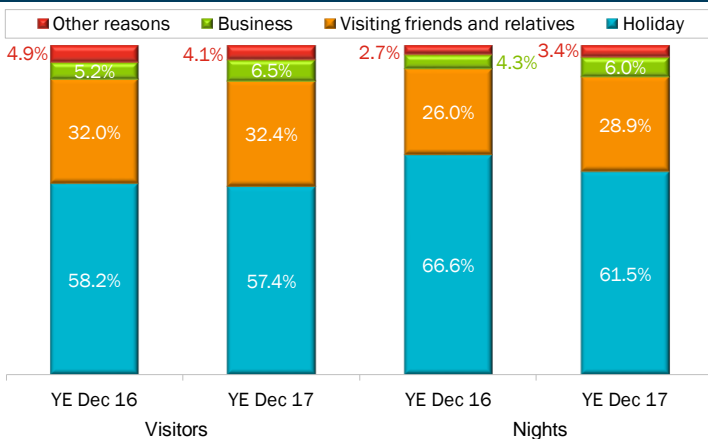
South Coast NSW received nearly 3.8 million domestic overnight visitors - up by 5.0% on YE Dec 16. Visitors spent nearly 11.8 million nights in the region - up by 4.4% on YE Dec 16.

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 16.9% of visitors and 16.1% of nights in regional NSW. Compared to YE Dec 16, the share of visitors was down by 0.4% pts and the share of nights was unchanged.

Purpose of visit to South Coast NSW



'Holiday' (57.4%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.4%) and 'business' (6.5%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 3.5% and 'VFR' increased by 6.3% while 'business' grew by 31.9%*.

'Holiday' (61.5%) was the largest purpose in terms of nights in the region, followed by 'VFR' (28.9%) and 'business' (6.0%). Compared to YE Dec 16, nights spent for 'holiday' declined by 3.6% while 'VFR' grew by 15.9% and 'business' increased by 43.6%.

Accommodation in South Coast NSW

'Friends or relatives property' (33.8%) was the most popular accommodation used for nights in the region, followed by 'caravan park or commercial camping ground' (17.7%) and 'rented house, apartment, flat or unit' (17.1%).

Origin

Origin	Share of visitors		Share of nights	
	YE Dec 16	YE Dec 17	YE Dec 16	YE Dec 17
Regional NSW	28.3%	29.8%	27.2%	28.7%
Sydney	43.7%	44.2%	37.5%	39.8%
Total intrastate	71.9%	73.9%	64.6%	68.5%
ACT	13.3%	13.4%	13.4%	11.0%
Victoria	8.6%	8.4%	14.0%	13.8%
Queensland	3.5%	2.4%	4.2%	3.1%
Other interstate	2.7%	1.9%	3.9%	3.6%
Total interstate	28.1%	26.1%	35.4%	31.5%

Sydney (44.2%) was the largest source of visitors to the region, followed by regional NSW (29.8%) and the ACT (13.4%). Compared to YE Dec 16, the Sydney source market grew by 6.2% and regional NSW increased by 10.5%. Over the same period, the ACT grew by 5.4% and Victoria increased by 3.0% while Queensland declined by 28.2%.

Sydney (39.8%) was the largest source market in terms of nights in the region, followed by regional NSW (28.7%) and Victoria (13.8%). Compared to YE Dec 16, nights spent by visitors from Sydney grew by 10.8% and nights from regional NSW increased by 10.1%. Over the same period, Victorian nights grew by 3.6% while nights by visitors from the ACT declined by 14.0% and Queensland nights decreased by 23.5%.

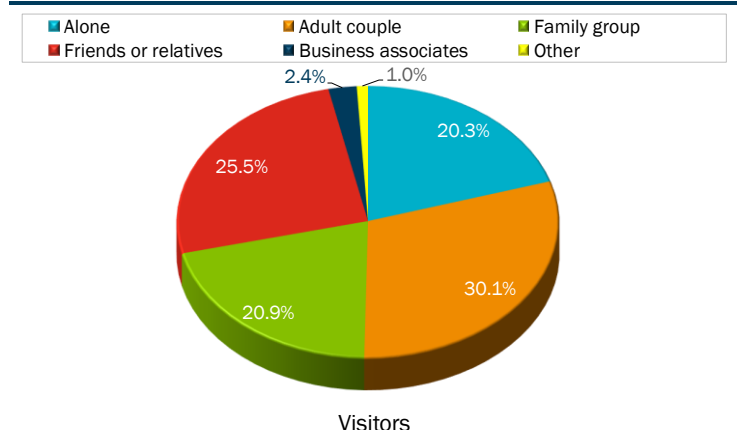
Top activities in South Coast NSW

'Eat out, dine at a restaurant or cafe' (62.5%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (51.8%) and 'visit friends and relatives' (43.0%).

Age groups

'15 to 29 years' (22.4%) was the largest age group of visitors to the region, followed by '50 to 59 years' (18.8%) and '40 to 49 years' (18.0%).

Travel party



'Adult couple' (30.1%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (25.5%) and 'family group' (20.9%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent over \$1.8 billion in the region - up by 15.4%* on YE Dec 16. On average, they spent \$154 per night - up by 10.6% on YE Dec 16.

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

Travel to South Coast NSW region

Year ended December 2017

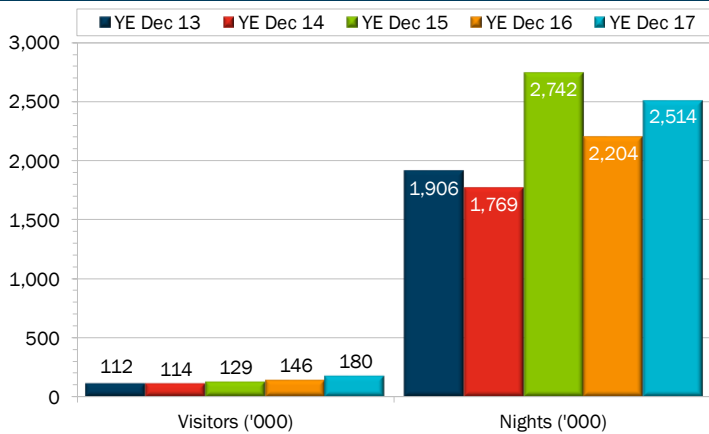
For the period of January 2017 to December 2017

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)	9.9	-6.8%	1.8%	38.0%	60.2%	16.3%	3
Total nights (million)	14.3	5.9%	17.6%	82.4%	0.0%	16.2%	2
Total spend (billion)	\$2.6	4.3%	9.5%	70.2%	20.4%	15.9%	3

International Overnight Travel²

Visitors and nights



South Coast NSW received 180,400 international overnight visitors - up by 23.7%* on YE Dec 16. Visitors spent over 2.5 million nights in the region - up by 14.1% 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 21.2% of visitors and 17.1% of nights in regional NSW. Compared to YE Dec 16, the share of visitors was up by 2.2% pts and the share of nights was up by 0.6% pts.

Purpose of visit to South Coast NSW

'Holiday' (66.3%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (23.8%) and 'business' (5.0%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 30.3%* and 'VFR' increased by 19.7%* while 'business' grew by 36.7%.

Origin - share of visitors to South Coast NSW

Rank	Individual market	Share of international visitors to South Coast NSW region		
		YE Dec 16	YE Dec 17	Origin region
1	United Kingdom	16.7%	16.7%	Europe
2	USA	12.0%	11.3%	North America
3	Mainland China	9.3%	8.6%	Asia
4	South Korea	3.7%	7.6%	New Zealand & Oceania
5	Germany	7.8%	7.1%	Other Countries

The United Kingdom (16.7%) was the region's largest individual source market of visitors, followed by the USA (11.3%) and Mainland China (8.6%).

Accommodation in South Coast NSW

'Rented house, apartment, flat or unit' (40.6%) was the most popular form of accommodation used for nights in the region, followed by 'friends or relatives property' (28.2%).

Age groups

'15 to 29 years' (30.8%) was the largest age group of visitors to the region, followed by '50 to 59 years' (18.7%) and '60 to 69 years' (15.8%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent \$246 million in the region - up by 14.7% on YE Dec 16. On average, they spent \$98 per night - up by 0.6% on YE Dec 16.

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

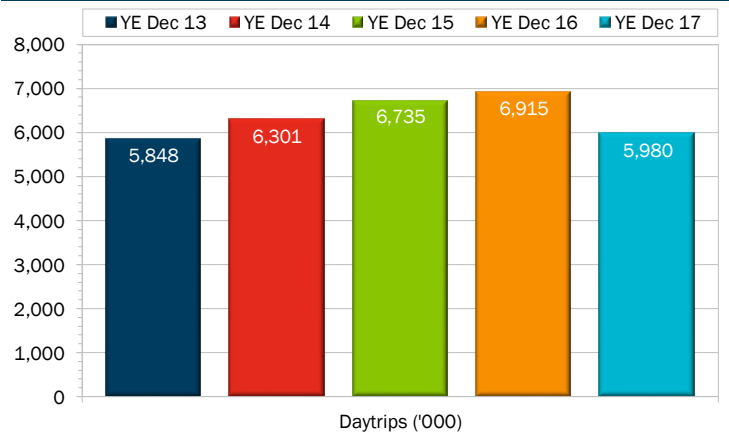
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



South Coast NSW received nearly 6.0 million domestic daytrip visitors - down by 13.5%* 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.

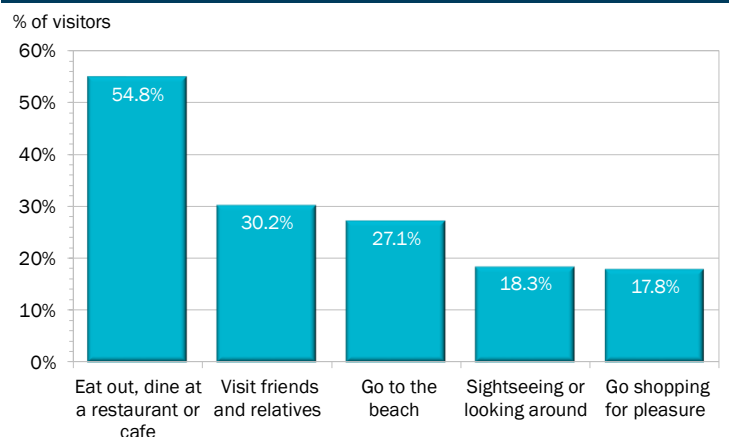
Market share

The region received 15.8% of daytrips to regional NSW. Compared to YE Dec 16, the share was down by 2.8% pts.

Main purpose of trip

'Holiday' (57.2%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (27.8%) and 'business' (5.8%). Compared to YE Dec 16, visitors who travelled for 'holiday' declined by 16.2%* and 'VFR' decreased by 4.8% while 'business' fell by 29.1%.

Top activities in South Coast NSW



'Eat out, dine at a restaurant or cafe' (54.8%) was the most popular activity undertaken by visitors to the region.

Expenditure³

Domestic daytrip visitors spent \$528 million in the region - down by 24.1%* on YE Dec 16. On average, they spent \$88 per trip - down by 12.2% 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 for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.