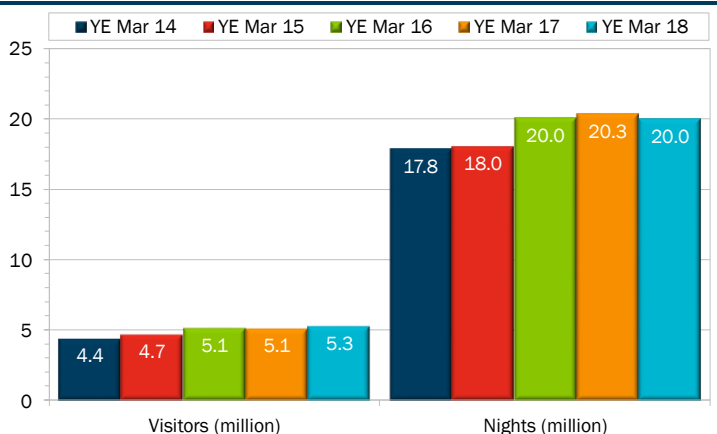


### Domestic Overnight Travel<sup>1</sup>

#### Visitors and nights



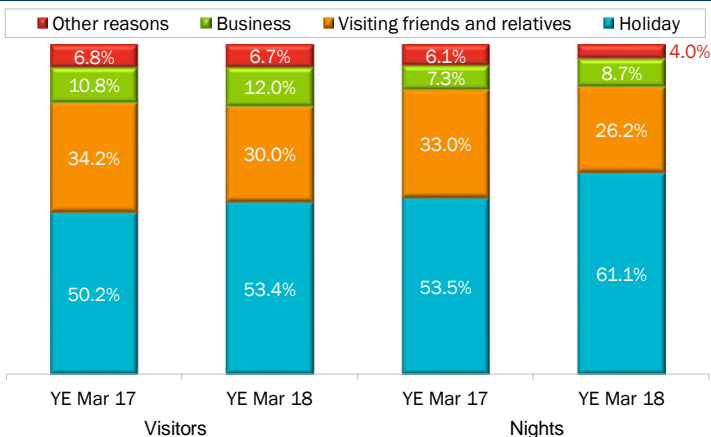
North Coast NSW received nearly 5.3 million domestic overnight visitors - up by 3.4% on YE Mar 17. Visitors spent nearly 20.0 million nights in the region - down by 1.8% on YE Mar 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 11.0 percent\* on last year and by 26.9 percent\* compared to four years ago.

#### Market share

The region received 22.9% of visitors and 26.8% of nights in regional NSW. Compared to YE Mar 17, the share of visitors was down by 1.7% pts and the share of nights was down by 2.1% pts.

#### Purpose of visit to North Coast NSW



'Holiday' (53.4%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (30.0%) and 'business' (12.0%). Compared to YE Mar 17, visitors who travelled for 'holiday' grew by 10.2%\* while 'VFR' declined by 9.2% and 'business' increased by 14.8%.

'Holiday' (61.1%) was the largest purpose in terms of nights in the region, followed by 'VFR' (26.2%) and 'business' (8.7%). Compared to YE Mar 17, nights spent for 'holiday' grew by 12.1%\* while 'VFR' declined by 22.1%\* and 'business' increased by 15.8%.

#### Accommodation in North Coast NSW

'Friends or relatives property' (30.6%) was the most popular accommodation used for nights in the region. 'Caravan park or commercial camping ground' (18.7%) was the 2<sup>nd</sup> most popular accommodation used, followed by 'rented house, apartment, flat or unit' (12.8%).

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 17	YE Mar 18	YE Mar 17	YE Mar 18
Regional NSW	35.5%	38.6%	33.4%	37.5%
Sydney	24.5%	23.9%	25.8%	26.5%
Total intrastate	59.9%	62.5%	59.2%	64.0%
Queensland	30.8%	27.9%	25.7%	22.2%
Victoria	5.7%	5.9%	9.8%	7.9%
ACT	1.2%	1.5%	1.4%	2.5%
Other interstate	2.4%	2.2%	3.9%	3.4%
Total interstate	40.1%	37.5%	40.8%	36.0%

Regional NSW (38.6%) was the largest source of visitors to the region, followed by Queensland (27.9%) and Sydney (23.9%). Compared to YE Mar 17, the regional NSW source market grew by 12.7%\* and Sydney increased by 1.1%. Over the same period, Queensland declined by 6.3% while Victoria grew by 6.7% and the ACT increased by 21.3%.

Regional NSW (37.5%) was the largest source market in terms of nights in the region, followed by Sydney (26.5%) and Queensland (22.2%). Compared to YE Mar 17, nights spent by visitors from regional NSW grew by 10.3% and nights from Sydney increased by 0.6%. Over the same period, nights by Queenslanders declined by 15.1% and Victorian nights decreased by 20.9% while nights by visitors from the ACT grew by 73.1%\*.

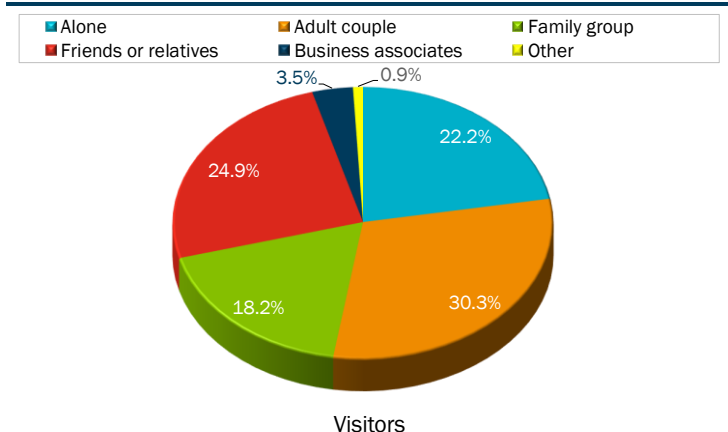
#### Top activities in North Coast NSW

'Eat out, dine at a restaurant or cafe' (66.0%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (49.3%) and 'visit friends and relatives' (40.3%).

#### Age groups

'15 to 29 years' (21.3%) was the largest age group of visitors to the region, followed by '30 to 39 years' (18.0%) and '40 to 49 years' (17.2%).

#### Travel party



'Adult couple' (30.3%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (24.9%) and 'alone' (22.2%).

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

Domestic overnight visitors spent nearly \$3.3 billion in the region - up by 14.9%\* on YE Mar 17. On average, they spent \$164 per night - up by 17.0% on YE Mar 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 18.

# Travel to North Coast NSW region

Year ended March 2018

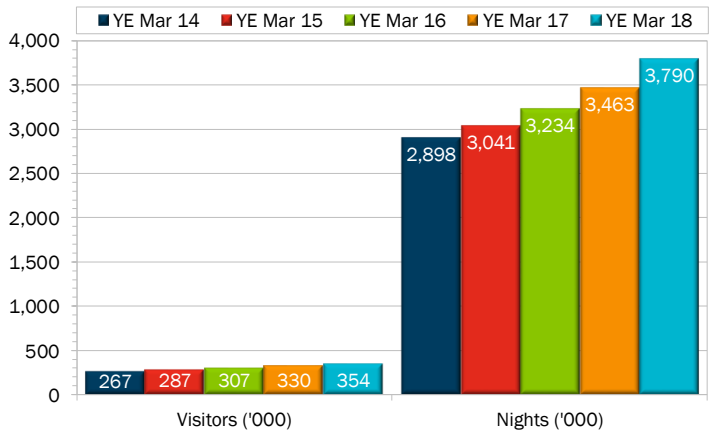
For the period of April 2017 to March 2018

Sources: (1) NVS & (2) IVS, YE Mar 18, TRA - unless otherwise specified.

Preliminary	YE Mar 18	YE on YE growth	Share of region			Share of regional NSW	Rank in regional NSW
			international overnight	domestic overnight	domestic daytrips		
Total visitors (million)	13.2	11.2%	2.7%	39.8%	57.5%	21.3%	1
Total nights (million)	23.8	-0.2%	16.0%	84.0%	0.0%	26.7%	1
Total spend (billion)	\$4.4	19.6%	5.4%	74.9%	19.7%	25.8%	1

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

### Visitors and nights



North Coast NSW received 353,800 international overnight visitors - up by 7.2%\* on YE Mar 17. Visitors spent nearly 3.8 million nights in the region - up by 9.5% on YE Mar 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 11.2 percent\* on last year and by 41.6 percent\* compared to four years ago.

### Market share

The region received 40.7% of visitors and 26.0% of nights in regional NSW. Compared to YE Mar 17, the share of visitors was down by 1.5% pts and the share of nights was up by 1.7% pts.

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

Rank	Individual market	Share of international visitors to North Coast NSW region		Origin region	YE Mar 17	YE Mar 18
		YE Mar 17	YE Mar 18			
1	United Kingdom	20.1%	19.4%	Europe	56.4%	55.8%
2	Germany	12.3%	11.5%	North America	16.9%	14.3%
3	New Zealand	9.2%	11.1%	Asia	11.3%	12.5%
4	USA	11.4%	9.5%	New Zealand & Oceania	10.3%	12.2%
5	Canada	5.5%	4.8%	Other Countries	5.1%	5.3%

The United Kingdom (19.4%) was the region's largest individual source market of visitors, followed by Germany (11.5%) and New Zealand (11.1%).

### Accommodation in North Coast NSW

'Friends or relatives property' (29.3%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (25.9%).

### Age groups

'15 to 29 years' (48.8%) was the largest age group of visitors to the region, followed by '30 to 39 years' (16.0%) and '60 to 69 years' (11.6%).

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

International overnight visitors spent \$236 million in the region - up by 19.1% on YE Mar 17. On average, they spent \$62 per night - up by 8.8% on YE Mar 17.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Mar 18.

### Preliminary IVS results

Due to quality issues with the incoming passenger data, IVS results for the YE Mar 18 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

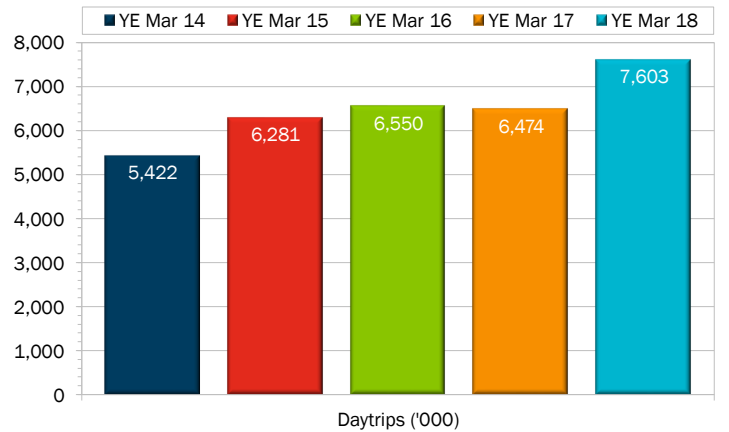
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Mar 18 are preliminary.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

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

### Daytrips



North Coast NSW received over 7.6 million domestic daytrip visitors - up by 17.4%\* on YE Mar 17.

Note: The number of domestic daytrips to regional New South Wales increased by 4.8 percent\* on last year and by 20.1 percent\* compared to four years ago.

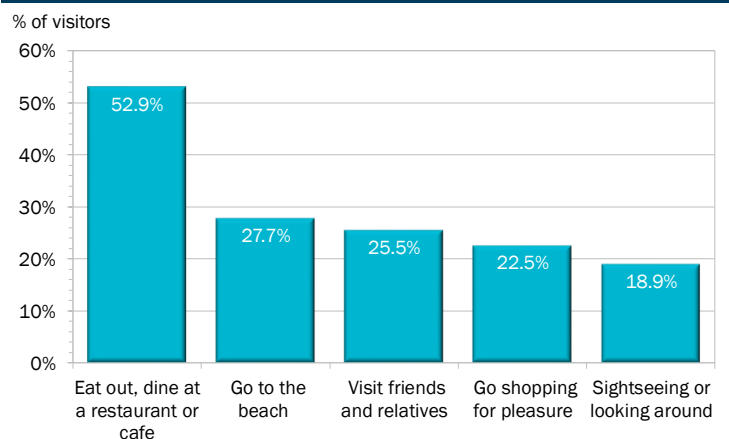
### Market share

The region received 19.9% of daytrips to regional NSW. Compared to YE Mar 17, the share was up by 2.1% pts.

### Main purpose of trip

'Holiday' (57.3%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (21.3%) and 'business' (7.4%). Compared to YE Mar 17, visitors who travelled for 'holiday' grew by 29.1%\* while 'VFR' declined by 12.0% and 'business' increased by 33.3%\*.

### Top activities in North Coast NSW



'Eat out, dine at a restaurant or cafe' (52.9%) was the most popular activity undertaken by visitors to the region.

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

Domestic daytrip visitors spent \$862 million in the region - up by 42.2%\* on YE Mar 17. On average, they spent \$113 per trip - up by 21.1% on YE Mar 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 18.

### 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.