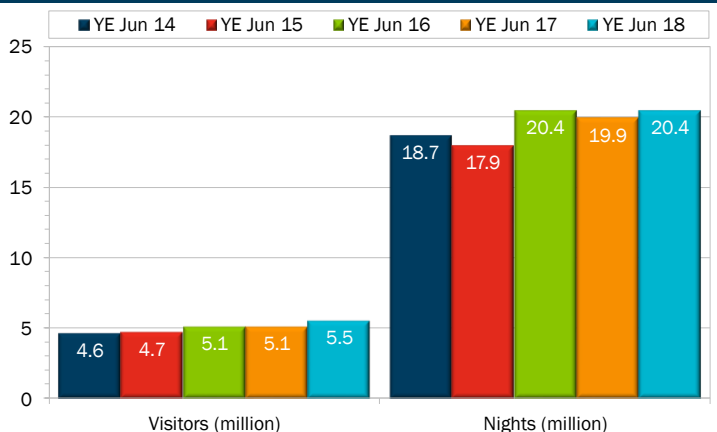


Domestic Overnight Travel¹

Visitors and nights



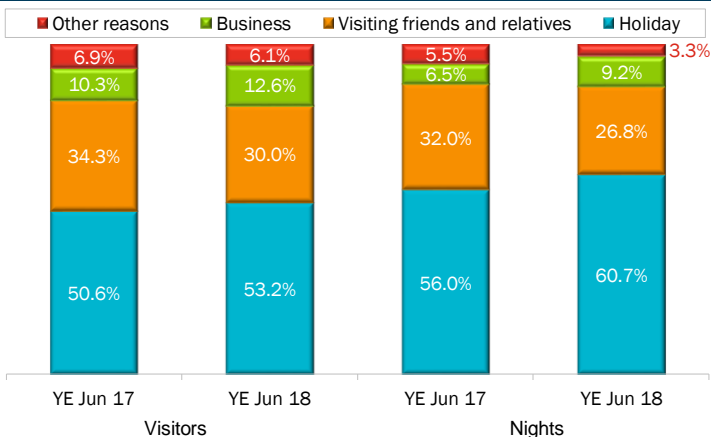
North Coast NSW received over 5.5 million domestic overnight visitors - up by 8.3%* on YE Jun 17. Visitors spent over 20.4 million nights in the region - up by 2.6% on YE Jun 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 9.4 percent* on last year and by 26.4 percent* compared to four years ago.

Market share

The region received 23.7% of visitors and 27.0% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was down by 0.2% pts and the share of nights was down by 1.2% pts.

Purpose of visit to North Coast NSW



'Holiday' (53.2%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (30.0%) and 'business' (12.6%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 14.0%* while 'VFR' declined by 5.1% and 'business' increased by 32.4%*.

'Holiday' (60.7%) was the largest purpose in terms of nights in the region, followed by 'VFR' (26.8%) and 'business' (9.2%). Compared to YE Jun 17, nights spent for 'holiday' grew by 11.1% while 'VFR' declined by 14.2% and 'business' increased by 46.7%*.

Accommodation in North Coast NSW

'Friends or relatives property' (31.6%) was the most popular accommodation used for nights in the region. 'Caravan park or commercial camping ground' (17.8%) was the 2nd most popular accommodation used, followed by 'rented house, apartment, flat or unit' (13.2%).

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 Jun 17	YE Jun 18	YE Jun 17	YE Jun 18
Regional NSW	37.9%	36.6%	35.5%	35.1%
Sydney	24.2%	25.1%	26.0%	27.6%
Total intrastate	62.1%	61.7%	61.5%	62.7%
Queensland	29.1%	29.4%	24.7%	23.8%
Victoria	5.6%	5.3%	9.2%	7.7%
ACT	1.2%	1.4%	1.6%	2.2%
Other interstate	2.0%	2.3%	3.0%	3.5%
Total interstate	37.9%	38.3%	38.5%	37.3%

Regional NSW (36.6%) was the largest source of visitors to the region, followed by Queensland (29.4%) and Sydney (25.1%). Compared to YE Jun 17, the regional NSW source market grew by 4.6% and Sydney increased by 12.4%*. Over the same period, Queensland grew by 9.2% and Victoria increased by 2.8% while the ACT grew by 23.6%.

Regional NSW (35.1%) was the largest source market in terms of nights in the region, followed by Sydney (27.6%) and Queensland (23.8%). Compared to YE Jun 17, nights spent by visitors from regional NSW grew by 1.6% and nights from Sydney increased by 8.7%. Over the same period, nights by Queenslanders declined by 1.1% and Victorian nights decreased by 13.3% while nights by visitors from the ACT grew by 43.4%.

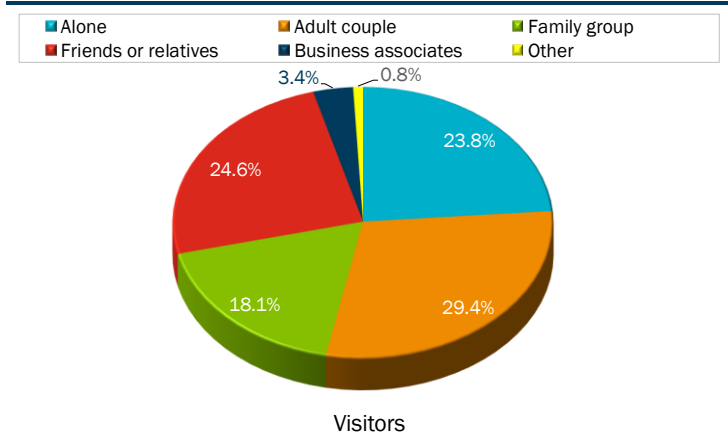
Top activities in North Coast NSW

'Eat out, dine at a restaurant or cafe' (67.1%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (50.1%) and 'visit friends and relatives' (39.9%).

Age groups

'15 to 29 years' (22.6%) was the largest age group of visitors to the region, followed by '30 to 39 years' (18.0%) and '50 to 59 years' (17.4%).

Travel party



'Adult couple' (29.4%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (24.6%) and 'alone' (23.8%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent nearly \$3.5 billion in the region - up by 23.1%* on YE Jun 17. On average, they spent \$169 per night - up by 20.0% on YE Jun 17.

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

Travel to North Coast NSW region

Year ended June 2018

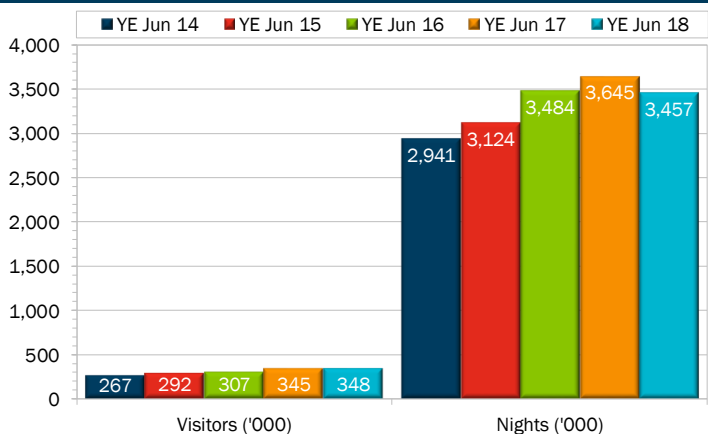
For the period of July 2017 to June 2018

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

Preliminary	YE Jun 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	5.7%	2.6%	41.9%	55.5%	21.0%	1
Total nights (million)	23.9	1.4%	14.5%	85.5%	0.0%	26.6%	1
Total spend (billion)	\$4.5	21.5%	4.9%	77.0%	18.1%	26.3%	1

International Overnight Travel² - preliminary

Visitors and nights



North Coast NSW received 347,600 international overnight visitors - up by 0.8% on YE Jun 17. Visitors spent nearly 3.5 million nights in the region - down by 5.1% on YE Jun 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 6.2 percent* on last year and by 40.4 percent* compared to four years ago.

Market share

The region received 40.3% of visitors and 24.3% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was down by 2.2% pts and the share of nights was down by 0.3% pts.

Origin - share of visitors to North Coast NSW

Share of international visitors to North Coast NSW region						
Rank	Individual market	YE Jun 17	YE Jun 18	Origin region	YE Jun 17	YE Jun 18
1	United Kingdom	20.5%	19.4%	Europe	55.4%	56.5%
2	Germany	11.5%	11.5%	North America	16.7%	14.1%
3	New Zealand	10.4%	10.5%	Asia	11.6%	12.2%
4	USA	11.4%	9.4%	New Zealand & Oceania	11.3%	11.8%
5	France	4.3%	5.2%	Other Countries	5.0%	5.4%

The United Kingdom (19.4%) was the region's largest individual source market of visitors, followed by Germany (11.5%) and New Zealand (10.5%).

Accommodation in North Coast NSW

'Friends or relatives property' (30.9%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (25.4%).

Age groups

'15 to 29 years' (49.2%) was the largest age group of visitors to the region, followed by '30 to 39 years' (15.6%) and '60 to 69 years' (12.0%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent \$221 million in the region - up by 2.0% on YE Jun 17. On average, they spent \$64 per night - up by 3.3% on YE Jun 17.

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

Preliminary IVS results

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

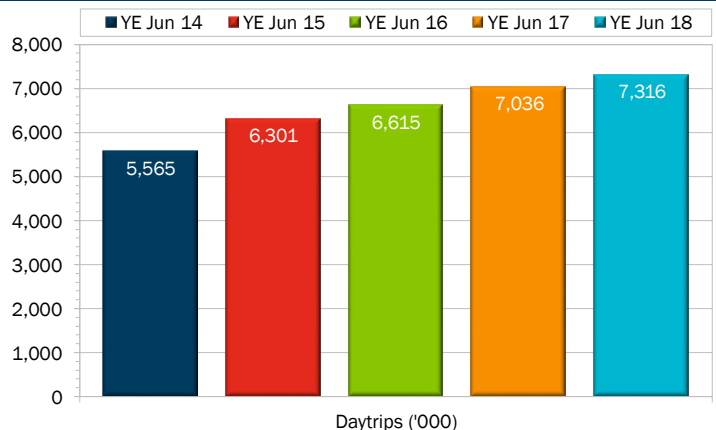
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Jun 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



North Coast NSW received over 7.3 million domestic daytrip visitors - up by 4.0% on YE Jun 17.

Note: The number of domestic daytrips to regional New South Wales increased by 4.0 percent* on last year and by 18.2 percent* compared to four years ago.

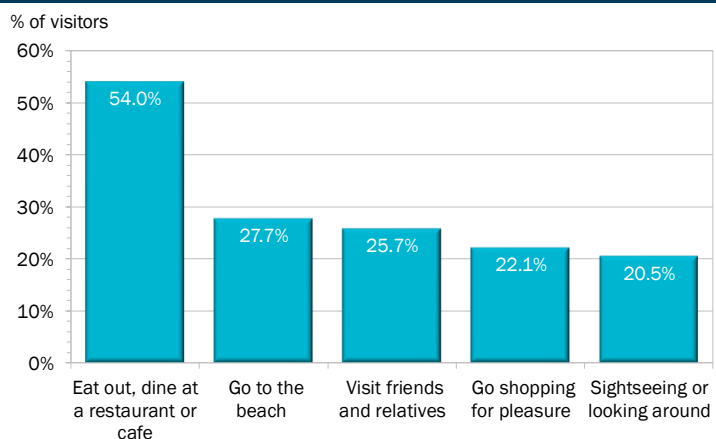
Market share

The region received 19.0% of daytrips to regional NSW. Compared to YE Jun 17, the share was unchanged.

Main purpose of trip

'Holiday' (57.6%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (21.9%) and 'business' (7.1%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 12.7%* while 'VFR' declined by 12.3% and 'business' increased by 5.0%.

Top activities in North Coast NSW



'Eat out, dine at a restaurant or cafe' (54.0%) was the most popular activity undertaken by visitors to the region.

Expenditure³

Domestic daytrip visitors spent \$815 million in the region - up by 22.3%* on YE Jun 17. On average, they spent \$111 per trip - up by 17.6% on YE Jun 17.

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

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.