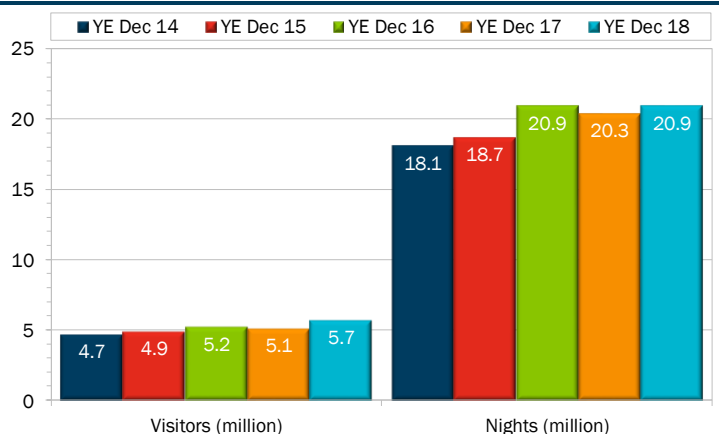


### Domestic Overnight Travel<sup>1</sup>

#### Visitors and nights



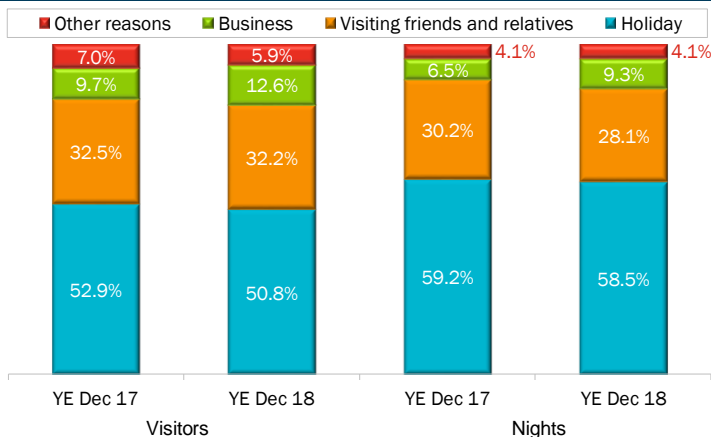
North Coast NSW received over 5.7 million domestic overnight visitors - up by 11.6%\* on YE Dec 17. Visitors spent nearly 20.9 million nights in the region - up by 2.6% on YE Dec 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 8.5 percent\* on last year and by 28.2 percent\* compared to four years ago.

#### Market share

The region received 23.5% of visitors and 26.8% of nights in regional NSW. Compared to YE Dec 17, the share of visitors was up by 0.6% pts and the share of nights was down by 0.9% pts.

#### Purpose of visit to North Coast NSW



'Holiday' (50.8%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.2%) and 'business' (12.6%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 7.1% and 'VFR' increased by 10.4%\* while 'business' grew by 44.9%\*.

'Holiday' (58.5%) was the largest purpose in terms of nights in the region, followed by 'VFR' (28.1%) and 'business' (9.3%). Compared to YE Dec 17, nights spent for 'holiday' grew by 1.3% while 'VFR' declined by 4.3% and 'business' increased by 46.1%\*.

#### Accommodation in North Coast NSW

'Friends or relatives property' (32.7%) was the most popular accommodation used for nights in the region. 'Caravan park or commercial camping ground' (18.6%) was the 2<sup>nd</sup> most popular accommodation used, followed by 'rented house, apartment, flat or unit' (14.1%).

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 17	YE Dec 18	YE Dec 17	YE Dec 18
Regional NSW	39.7%	35.6%	37.5%	34.3%
Sydney	22.3%	26.9%	24.9%	29.0%
Total intrastate	62.1%	62.5%	62.4%	63.3%
Queensland	28.5%	28.6%	24.5%	22.8%
Victoria	5.8%	5.7%	7.8%	8.9%
ACT	1.2%	1.7%	1.8%	2.7%
Other interstate	2.5%	1.5%	3.5%	2.3%
Total interstate	37.9%	37.5%	37.6%	36.7%

Regional NSW (35.6%) was the largest source of visitors to the region, followed by Queensland (28.6%) and Sydney (26.9%). Compared to YE Dec 17, the regional NSW source market grew by 0.1% and Sydney increased by 34.2%\*. Over the same period, Queensland grew by 12.0%\* and Victoria increased by 10.3% and the ACT grew by 66.3%\*.

Regional NSW (34.3%) was the largest source market in terms of nights in the region, followed by Sydney (29.0%) and Queensland (22.8%). Compared to YE Dec 17, nights spent by visitors from regional NSW declined by 6.1% while nights from Sydney grew by 19.2%\*. Over the same period, nights by Queenslanders declined by 4.7% while Victorian nights grew by 17.4% and nights by visitors from the ACT increased by 53.8%.

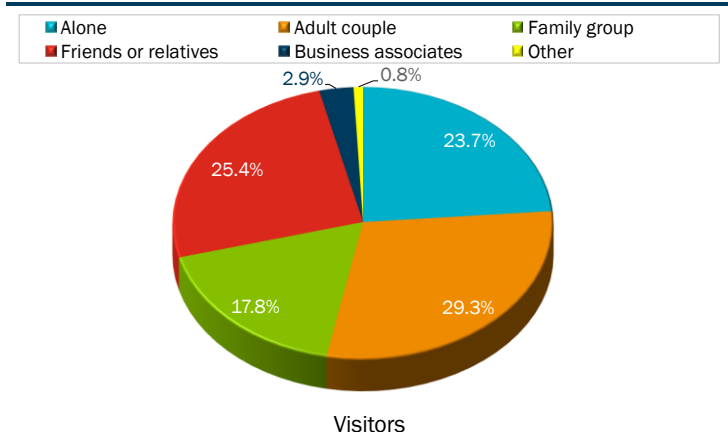
#### Top activities in North Coast NSW

'Eat out, dine at a restaurant or cafe' (67.3%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (51.0%) and 'visit friends and relatives' (44.1%).

#### Age groups

'15 to 29 years' (23.6%) was the largest age group of visitors to the region, followed by '30 to 39 years' (17.8%) and '40 to 49 years' (17.3%).

#### Travel party



'Adult couple' (29.3%) was the most common travel party amongst visitors to the region, followed by 'friends or relatives' (25.4%) and 'alone' (23.7%).

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

Domestic overnight visitors spent nearly \$3.5 billion in the region - up by 11.4%\* on YE Dec 17. On average, they spent \$167 per night - up by 8.6% on YE Dec 17.

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

# Travel to North Coast NSW region

Year ended December 2018

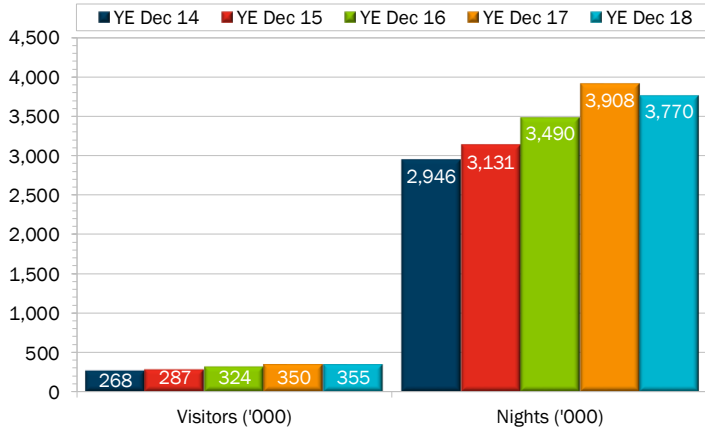
For the period of January 2018 to December 2018

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

	YE Dec 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)	13.5	8.9%	2.6%	42.1%	55.2%	21.0%	1
Total nights (million)	24.6	1.6%	15.3%	84.7%	0.0%	26.6%	1
Total spend (billion)	\$4.5	9.9%	5.1%	76.8%	18.1%	25.6%	1

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

### Visitors and nights



North Coast NSW received 355,200 international overnight visitors - up by 1.5% on YE Dec 17. Visitors spent nearly 3.8 million nights in the region - down by 3.6% on YE Dec 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 2.0 percent on last year and by 36.6 percent\* compared to four years ago.

### Market share

The region received 40.8% of visitors and 25.3% of nights in regional NSW. Compared to YE Dec 17, the share of visitors was down by 0.2% pts and the share of nights was down by 1.3% pts.

### Purpose of visit to North Coast NSW

'Holiday' (78.6%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (18.3%) and 'business' (2.9%). Compared to YE Dec 17, visitors who travelled for 'holiday' declined by 0.5% while 'VFR' grew by 2.3% and 'business' increased by 32.4%.

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

Rank	Individual market	Share of international visitors to North Coast NSW region				
		YE Dec 17	YE Dec 18	Origin region	YE Dec 17	YE Dec 18
1	United Kingdom	19.9%	19.2%	Europe	55.8%	55.2%
2	Germany	11.0%	11.3%	North America	15.2%	14.1%
3	New Zealand	10.9%	9.8%	Asia	12.6%	13.7%
4	USA	10.1%	9.4%	New Zealand & Oceania	11.7%	11.0%
5	France	4.8%	5.4%	Other Countries	4.7%	5.9%

The United Kingdom (19.2%) was the region's largest individual source market of visitors, followed by Germany (11.3%) and New Zealand (9.8%).

### Accommodation in North Coast NSW

'Friends or relatives property' (28.9%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (22.8%).

### Age groups

'15 to 29 years' (47.9%) was the largest age group of visitors to the region, followed by '30 to 39 years' (16.0%) and '60 to 69 years' (12.2%).

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

International overnight visitors spent \$230 million in the region - down by 5.3% on YE Dec 17. On average, they spent \$61 per night - down by 1.8% on YE Dec 17.

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

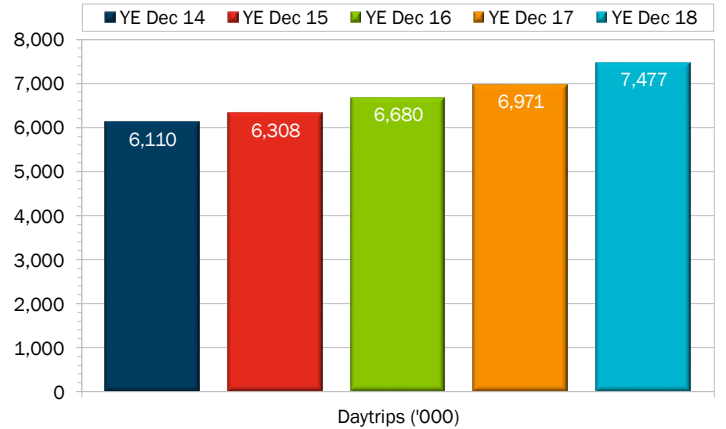
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

\* 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 7.5 million domestic daytrip visitors - up by 7.3% on YE Dec 17.

Note: The number of domestic daytrips to regional New South Wales increased by 4.5 percent\* on last year and by 17.3 percent\* compared to four years ago.

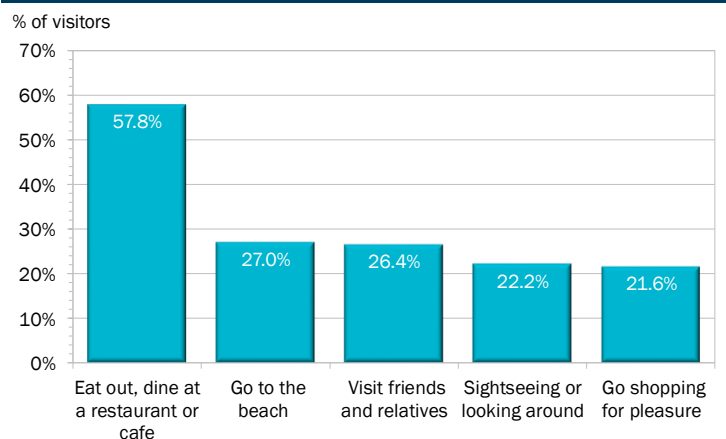
### Market share

The region received 19.0% of daytrips to regional NSW. Compared to YE Dec 17, the share was up by 0.5% pts.

### Main purpose of trip

'Holiday' (56.9%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (22.1%) and 'business' (8.8%). Compared to YE Dec 17, visitors who travelled for 'holiday' grew by 10.9% and 'VFR' increased by 6.2% while 'business' grew by 39.2%\*.

### Top activities in North Coast NSW



'Eat out, dine at a restaurant or cafe' (57.8%) was the most popular activity undertaken by visitors to the region.

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

Domestic daytrip visitors spent \$819 million in the region - up by 8.8% on YE Dec 17. On average, they spent \$110 per trip - up by 1.4% on YE Dec 17.

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