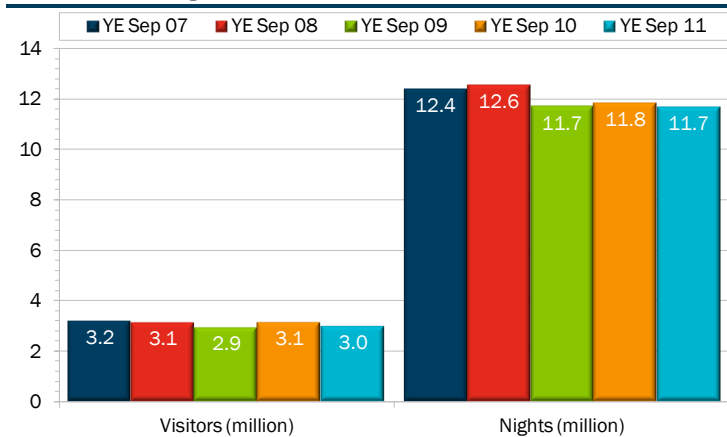


Domestic Overnight Travel (1)

Visitors and nights



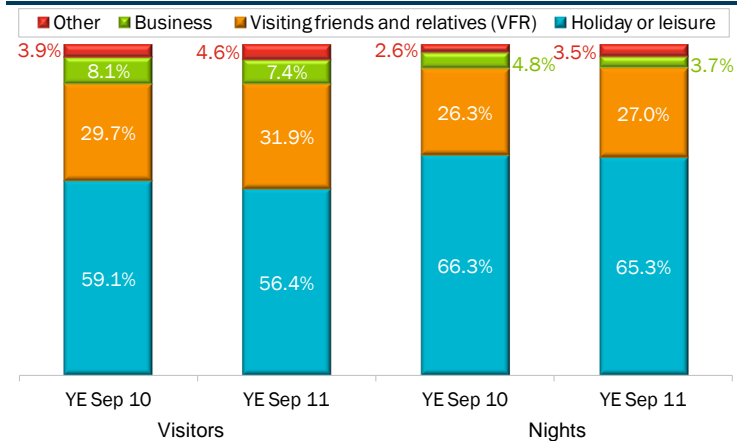
Mid North Coast received almost 3.0 million domestic overnight visitors - down by 4.6% on YE Sep 10. Visitors spent nearly 11.7 million nights in the region - down by 1.3% on YE Sep 10.

Note: The number of domestic overnight trips to regional New South Wales increased by 0.3 percent on last year, but was down by 4.0 percent* compared to four years ago.

Market share

The region received 17.7% of visitors and 19.7% of nights in regional NSW. Compared to YE Sep 10, the share of visitors was down by 0.9% pts and share of nights was down by 0.4% pts.

Purpose of visit to the region



'Holiday or leisure' (56.4%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (31.9%) and 'business' (7.4%). Compared to YE Sep 10, visitors who travelled for 'holiday or leisure' declined by 8.9% while 'VFR' grew by 2.5% and 'business' decreased by 12.2%.

'Holiday or leisure' (65.3%) was the largest purpose in terms of nights in the region, followed by 'VFR' (27.0%) and 'business' (3.7%). Compared to YE Sep 10, nights spent for 'holiday or leisure' declined by 2.8% while 'VFR' grew by 1.6% and 'business' declined by 24.4%.

Accommodation

'Friends or relatives property' (28.0%) was the most popular accommodation used for nights in the region, followed by 'caravan park or commercial camping ground' (20.6%) and 'rented house, apartment, flat or unit' (18.9%).

Mid North Coast is composed of: Bellingen; Coffs Harbour; Great Lakes; Greater Taree; Port Macquarie-Hastings; Kempsey; Nambucca; and Port Stephens.

* The percentage change is statistically significant.

(1) Source: National Visitor Survey, YE Sep 11, Tourism Research Australia (TRA)

Origin

Origin	Share of visitors		Share of nights	
	YE Sep 10	YE Sep 11	YE Sep 10	YE Sep 11
Regional NSW	44.3%	47.9%	39.7%	44.1%
Sydney	39.9%	34.0%	43.8%	34.5%
Total intrastate	84.2%	81.9%	83.5%	78.6%
Victoria	4.3%	4.4%	5.6%	5.6%
Queensland	9.3%	10.6%	8.2%	11.1%
ACT	0.7%	1.6%	0.8%	2.6%
Other interstate	1.5%	1.6%	1.9%	2.2%
Total interstate	15.8%	18.2%	16.5%	21.4%

Regional NSW (47.9%) was the largest source of visitors to the region, followed by Sydney (34.0%) and Queensland (10.6%). Compared to YE Sep 10, the regional NSW source market grew by 3.2% while Sydney declined by 18.9%*. Over the same period, Victoria declined by 3.0% while Queensland grew by 9.2% and the ACT increased by 114%*.

Regional NSW (44.1%) was the largest source market in terms of nights in the region, followed by Sydney (34.5%) and Queensland (11.1%). Compared to YE Sep 10, nights spent by visitors from regional NSW grew by 9.9% while nights from Sydney declined by 22.3%*. Over the same period, nights by Victorians declined by 3.0% while Queensland nights grew by 33.7% and nights by visitors from the ACT increased by 224%*.

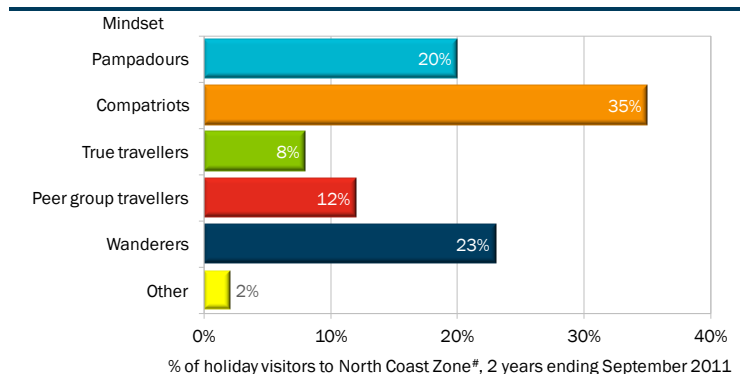
All transport

'Private or company vehicle' (90.9%) was the most popular form of transport used by visitors to the region.

Activities

'Eat out at restaurants' (57.3%) was the most popular activity undertaken by visitors to the region, followed by 'go to the beach' (45.5%) and 'visit friends and relatives' (42.6%).

Australian Travel Mindsets (2)



Pampadours - want luxury; Compatriots - mostly families; True travellers - want depth of experience; Peer group travellers - seeking a fun experience with friends; and Wanderers - taking time to explore and discover.

(2) Source: Inside Story, 2YE Sep 11

combined regions of Northern Rivers and Mid North Coast, plus selected local areas of The Hunter and Central Coast regions.

Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent over \$1.5 billion in the region - down by 4.8% on YE Sep 10. On average, visitors spent \$130 per night in the region - down by 3.7% on YE Sep 10.

(3) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Sep 10 and YE Sep 11, TRA

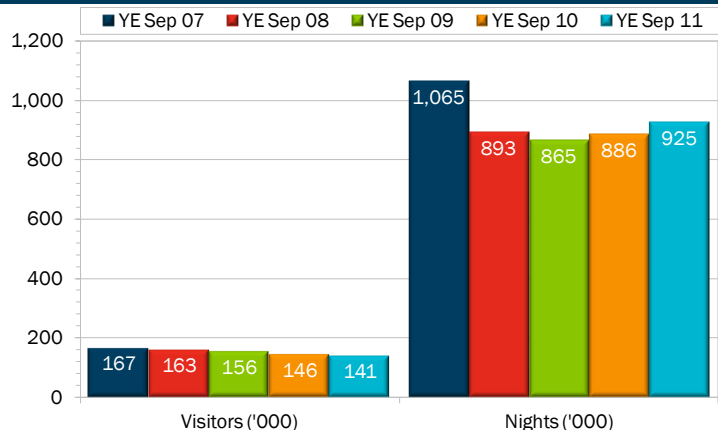
Travel to Mid North Coast

Year ended September 2011

Total visitors (million)	6.6
Total nights (million)	12.6
- domestic nights	92.6%
- international nights	7.4%
Total expenditure (million)	\$1,953

International Overnight Travel (4)

Visitors and nights



Mid North Coast received 140,700 international overnight visitors - down by 3.8% on YE Sep 10. Visitors spent 924,800 nights in the region - up by 4.3% on YE Sep 10.

Note: The number of overnight trips to regional New South Wales by international visitors decreased by 1.2 percent on last year and by 0.8 percent compared to four years ago.

Market share

The region received 23.5% of visitors and 8.4% of nights in regional NSW. Compared to YE Sep 10, the share of visitors was down by 0.6% pts and share of nights was down by 0.3% pts.

Purpose of visit to the region

'Holiday / pleasure' (81.2%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (16.6%) and 'business' (1.3%). Compared to YE Sep 10, visitors who travelled for 'holiday / pleasure' declined by 7.6% while 'VFR' grew by 18.2% and 'business' decreased by 15.6%.

Origin - share of visitors to the region

Share of international visitors to Mid North Coast							
Rank	Market	YE Sep 10	YE Sep 11	Rank	Market	YE Sep 10	YE Sep 11
1	United Kingdom	29.2%	23.9%	12	Singapore	0.4%	1.7%
2	New Zealand	9.6%	9.6%	13	Korea	2.5%	1.3%
3	Germany	10.4%	9.4%	14	Italy	1.3%	0.8%
4	Canada	5.8%	9.0%	15	Japan	0.8%	0.8%
5	USA	8.8%	7.5%	16	Taiwan	0.3%	0.6%
6	Netherlands	3.5%	4.9%	17	Thailand	0.3%	0.6%
7	Scandinavia	5.9%	4.7%	18	Malaysia	0.4%	0.5%
8	Switzerland	3.7%	4.2%	19	Indonesia	0.2%	0.3%
9	Mainland China & HK	2.0%	3.5%	20	India	0.3%	0.2%
	Mainland China	1.3%	1.6%	21	Middle East & Nth Africa	0.6%	0.2%
	Hong Kong	0.7%	1.9%		Other Asia	1.2%	1.0%
10	France	3.0%	3.4%		Other Europe	3.9%	5.5%
11	Ireland	1.5%	3.2%		Other Countries	4.3%	3.3%

Accommodation

'Home of friend or relative' (40.2%) was the most popular form of accommodation used for nights in the region.

Expenditure (incl pre-paid package expenditure) (5)

International overnight visitors spent \$62 million in the region - up by 8.0% on YE Sep 10. On average, visitors spent \$67 per night in the region - up by 3.1% on YE Sep 10.

(5) Caution: international expenditure now includes 30% of pre-paid package expenditure but still excludes all pre-paid international airfares. Source: Modelled international overnight visitor expenditure in Australia's regions, YE Sep 10 and YE Sep 11, TRA. For more details go to www.tourism.nsw.gov.au/StateTourismStats

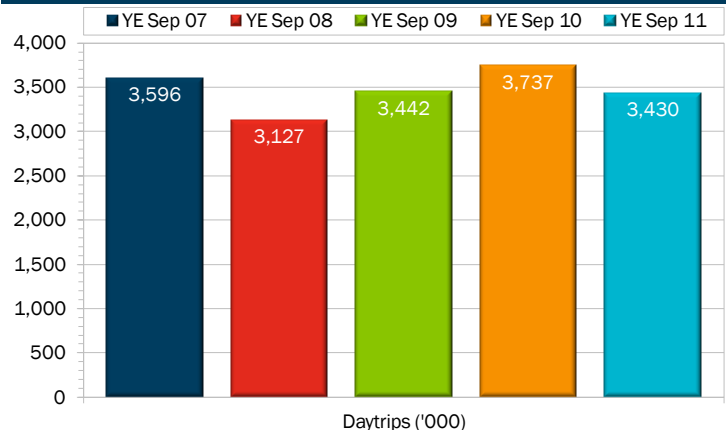
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(4) Source: International Visitor Survey, YE Sep 11, TRA

Domestic Daytrip Travel (6)

Daytrips



Mid North Coast received over 3.4 million domestic daytrip visitors - down by 8.2% on YE Sep 10.

Note: The number of domestic daytrips to regional New South Wales increased by 1.4 percent on last year and was up by 4.3 percent compared to four years ago.

Market share

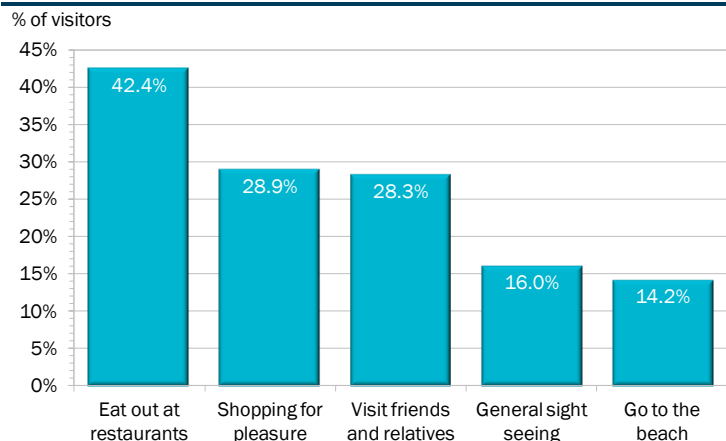
The region received 10.7% of daytrips to regional NSW. Compared to YE Sep 10, the share was down by 1.1% pts.

Main purpose of trip

'Holiday or leisure' (51.3%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (20.7%) and 'business' (10.5%).

Compared to YE Sep 10, visitors who travelled for 'holiday or leisure' declined by 0.7% and 'VFR' decreased by 26.7% while 'business' declined by 13.7%.

Activities



'Eat out at restaurants' (42.4%) was the most popular activity undertaken by visitors to the region. 'Shopping for pleasure' (28.9%) was the 2nd most popular, followed by 'visit friends and relatives' (28.3%) and 'general sightseeing' (16.0%).

Expenditure (7)

Domestic daytrip visitors spent \$377 million in the region - down by 28.6%* on YE Sep 10. On average, they spent \$110 per trip to the region - down by 22.0% on YE Sep 10.

(7) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Sep 10 and YE Sep 11, TRA

(6) Source: National Visitor Survey, YE Sep 11, TRA

www.tourism.nsw.gov.au

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