

Eurobodalla Shire

Visitor Volume
Visitor Profile
Visitor Expenditure
Expenditure Dependent Jobs

Estimates for the Year ending June 30, 2016

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TOURISM STRATEGY DEVELOPMENT SERVICES
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EUROBODALLA SHIRE

Visitor Volumes - Visitor Profile – Visitor Expenditure – Tourism-dependent Jobs
ESTIMATES FOR THE YEAR ENDING 30 JUNE 2016.

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1. INTRODUCTION

1.1 Purpose

This document presents Eurobodalla Local Government Area (LGA) estimates for visitor volume, expenditure, and jobs dependent upon this expenditure for the year ending June 2016. It also presents comparative visitor profiles across sub-regions of the South Coast.

The methodology used to produce the year ending June estimates has benefited from several improvements in the accuracy and relevance of source data. These include the introduction of a destination to LGA correspondence, the availability of Eurobodalla-specific expenditure estimates and the release of a Tourism Satellite Account (TSA) for the South Coast Region. These are significant enhancements and add considerable strength to the estimates. They also mean, however, that the estimates are not directly comparable with those produced in previous years. This is particularly true for expenditure and employment estimates.

The approach used in preparing the estimates is explained at appropriate points throughout the document.

1.2 Challenges of measuring the value of tourism

The Australia Australian and New Zealand Standard Industrial Classification (ANZSIC) is the industry classification backbone of National and State accounts. Various measures of the economic significance of the ANZSIC defined industries are available on a regular basis. "Tourism" does not appear in the ANZSIC list. This is because tourism is actually made up of 'portions' of many industries defined in ANZSIC. When a shop that falls within the ANZSIC definition of 'retail trade' sells something to a visitor, for example, that portion of the shop's activity is due to tourism. The same is true for cafés and restaurants. Although they serve a mix of visitors and residents the standard National and State accounts record this economic activity in the ANZSIC category of 'Cafes, restaurants and takeaway food services'.

To address this fundamental limitation, the Tourism Satellite Accounting (TSA) methodology was developed. In simple terms, the TSA methodology measures the tourism component of the various tourism-related industries defined in ANZSIC. Combined, these form the 'tourism' industry. TSA is a formal component of National accounting in several countries. In Australia TSA are prepared at both the National and State level on a regular basis.

Given the costs associated with implementing the TSA methodology it has rarely been applied below the State level. Whilst State Governments may fund Regional TSA modelling from time to time, it is unrealistic to expect this to ever extend to a Local Government level. It is even more unrealistic to envisage a scenario in which any Local Government could fund their own TSA.

1.3 The Options for Local Government Areas

Faced with this reality Local Government have the choice of doing nothing to value tourism at the local level, or do what it can with the resources they have available to produce the best estimate they can.

Commercially available economic models are one option. These deliver a range of standard economic measures that quantify and describe the value of tourism in the LGA. These standard measures are comparable with those for other industries within the LGA. Whilst the definitions of the economic measures generated by these models are strong measures of the value of tourism, the accuracy of the measures, as with all models, are subject to strengths and weaknesses of the input data. For example, where models use LGA employment data from Census, this data may be up to six years old. Census employment data is also restricted to a point in time 'snapshot' of a person's main industry of employment. No LGA specific expenditure is used in these models.

A less costly option is to use a combination of visitor expenditure with relationships between expenditure and employment drawn from Tourism Satellite Accounts. Whilst visitor expenditure is clearly a 'gross' indicator of the significance of tourism, as of the year ending June 2016 it is an LGA-specific estimate. This option has increased in attractiveness recently because of improvements in the accuracy and relevance of source data as described above (especially expenditure and Regional TSAs).

Whilst both options have their limitations there is merit in using either on a consistent basis in order to maintain an understanding of the value and significance of tourism – especially in terms of the jobs that are dependent upon it.

2. VISITOR VOLUME

Visitor volume estimates for the year ending June 2015 are shown in Table 1 and Table 2. The data is unpublished data extracted from the National and International Visitor Survey datasets. The author is licensed to access these datasets using the same software as TRA. Sample sizes associated with the estimates have been examined to ensure they exceed accepted minimums. Data is not available for international day visitors.

Visitor definitions are those used by Tourism Research Australia in the collection of data for the NVS and IVS. These are, in turn, based on those provided by the United Nations World Tourism Organisation. Three main definitions are applied in this document:

Domestic Overnight Trips

- Trips made by Australian residents involving a stay away from home for at least one night, at a place at least 40 kilometres from home.
- Trips where the respondent is away from home for more than 12 months are excluded.
- The word trips and visitors is used interchangeably.

Domestic Day Visitors

- Day visitors are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least four hours and do not spend a night away from home.
- Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home.
- Trips where the respondent is away from home for more than 12 months are also excluded.

International Visitors

- Visitors from overseas who spend less than 12 months in Australia.
- Visitor and nights estimates relate to those who stay overnight in destinations.
- International day visitors to a destination are therefore not counted in this document and are therefore excluded from estimates of economic significance.

Until June this year, LGAs were not included as a defined area in the datasets. It was necessary to combine relevant SA2's (Statistical Area – Level 2) to form areas that represented LGAs. In June this year however, Tourism Research Australia implemented a longitude/latitude based destination to LGA correspondence that bypassed the need group and allocate SA2s. Over 40,000 locations in Australia are now allocated direct to LGAs on an ongoing basis. This has resulted in a slight adjustment to estimates generated using the SA2 grouping and allocation methodology. The difference is small; but should be noted nonetheless.

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Visitor Volumes - Visitor Profile – Visitor Expenditure – Tourism-dependent Jobs
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Visitor Category	Visitors (000)
Domestic Overnight Visitors	708
Domestic Day Visitors	690
International Overnight Visitors	28
International Day Visitors	Data does not exist
TOTAL VISITORS*	1,426

Table 1: Eurobodalla Visitor Volume x Visitor Category 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016).

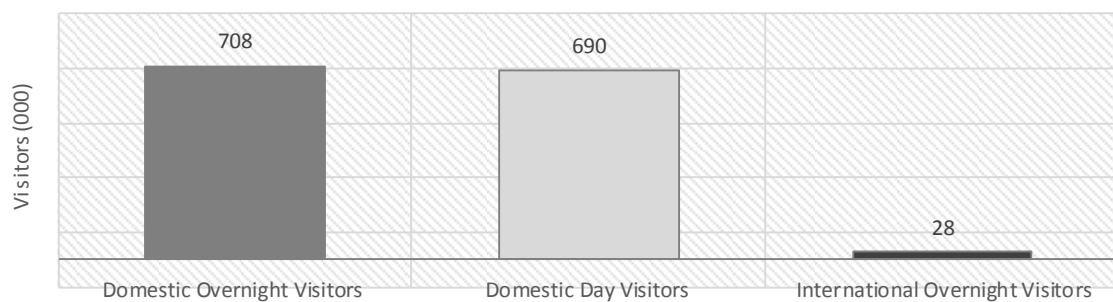


Figure 1: Eurobodalla Visitor Volume x Visitor Category 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016)

Visitor Category	Visitors (000)
Domestic Visitor Nights	2,423
International Visitor Nights	87
TOTAL VISITORS	2,510

Table 2: Eurobodalla Visitor Nights Estimates x Visitor Category 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016)

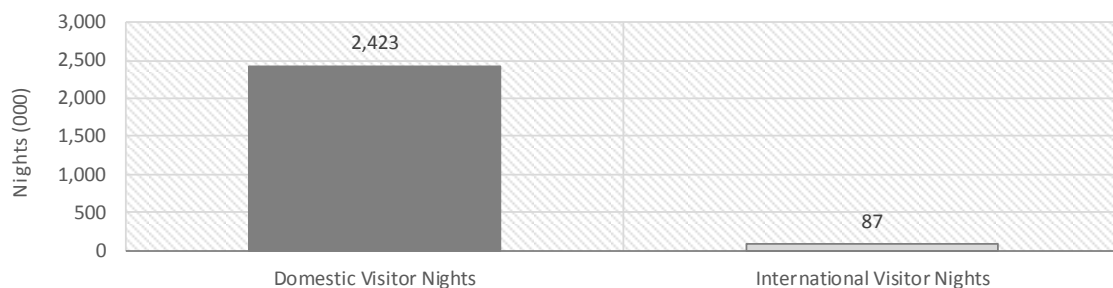


Figure 2: Eurobodalla Visitor Volume x Visitor Category 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016)

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3. VISITOR EXPENDITURES

Visitor expenditures have been estimated by combining the Eurobodalla LGA visitor volume estimates with estimates of expenditure per night (for overnight visitors) and expenditure per visit (for domestic day visitors). As indicated above, data for international day visitor volume is not produced. The same is true of expenditure estimates for this category of visitor. They have, therefore, been excluded from the expenditure estimates.

In the past, South Coast Region expenditures have been used in this equation. This was due to lack of currency of published LGA-specific estimates and the use of data spanning a four-year period. There has been improvement in LGA expenditure data over the course of the past year. TRA modelers are now able to generate LGA-specific expenditure estimates for specific years on an as-required/custom data-order basis. The following expenditure estimates are therefore specific to Eurobodalla LGA and relate to the year ending June 2016. Whilst this is a significant improvement compared to using South Coast Region expenditures, it does result in a break-in-series. Expenditure estimates presented in this document are not, therefore, comparable with previous estimates.

Visitor Category	\$ Per Visit	\$Per Night
Domestic Overnight Visitors	394	115
Domestic Day Visitors	121	NA
International Overnight Visitors	301	98

Table 3: Eurobodalla LGA per visit and per night expenditures x Visitor Category 2015/16

Source: Tourism Research Australia; Modelled visitor expenditure in Eurobodalla LGA for YE June 2016 (unpublished)

Visitor Category	Total Expenditure (\$m)
Domestic Overnight Visitors	279
Domestic Day Visitors	83
International Overnight Visitors	8
	370

Table 4: Total Eurobodalla LGA visitor expenditures x visitor category 2015/16

Data Sources: Tourism Research Australia; Modelled visitor expenditure in Eurobodalla LGA for year ending June 2016 (unpublished); Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016) (unpublished).

Note: Using inflation adjusted visitor expenditures in conjunction with 2014/15 visitor volumes total expenditure is an estimated \$321 million. Whilst both figures are subject to limitations the positive difference is clearly a better outcome than a negative shift.

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4. TOURISM-DEPENDENT JOBS

The number of jobs supported by tourism at a Local Government Area level is, unfortunately, not simple to estimate. Some of the challenges associated with this are noted in Section 1 of this document.

In addition to updating the visitor volume and expenditure data to year end June 2016, the relevance of the TSA-related assumptions used in the employment estimation methodology has been increased. Previous estimates used expenditure to employment ratios implicit in the State TSA. Whilst these were discounted to account for inevitable differences between the State economy and the Eurobodalla economy, the 'starting point' remained the State of NSW. In October, this year, however, Destination NSW (in conjunction with TRA) released TSAs for each NSW tourism region. It has been possible, therefore, to use expenditure to employment ratios implicit in the South-Coast Tourism Region TSA. As with expenditure estimates, whilst this is a clear improvement to the employment estimate equation, it does cause a break in series. Employment estimates presented in this document are not, therefore, be comparable with previous estimates.

Relationship	Jobs (FTE*)	Jobs (All**)
Direct	2,482	3,300
Indirect	1,284	1,600
TOTAL	3,686	4,900

Table 5: Estimate of jobs supported by Tourism in the Eurobodalla Local Government Area 2015/16

*FTE = Full time equivalent jobs.

**All jobs are persons who have a tourism-dependent job (casual, part time or full time)

Data Sources:

Tourism Research Australia; National Visitor Survey (2015, 2016), International Visitor Survey (2015, 2016);
Modelled visitor expenditure in Eurobodalla YE Jun 16; Destination NSW (and TRA) Economic Significance of
Tourism in the South Coast Region (2013/14); Tourism Employment in Australia 2011–12 To 2029–30

These estimates should be seen as an indication of the number of jobs supported by visitor expenditure for the year ending June 2016 – not an actual count. The estimates are subject to limitations associated with the input data and the methodology employed. Given Eurobodalla specific visitor volume and Eurobodalla specific visitor expenditure estimates have been used they should not be discounted as a contribution to better understanding the economic significance of tourism in the Eurobodalla Local Government Area.

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5. VISITOR PROFILE

The visitor profile data in this document has been extracted directly from the National and International Visitor Survey databases¹. Recent enhancements to the coding of the NVS and IVS responses permits the allocation of respondent's information directly to respective LGAs. This bypasses the need to amalgamate SA2 areas and make decisions regarding what portions of shared SA2s to allocate to an LGA. It also enables the creation of three LGA-based South Coast sub-regions to compare the visitor profile within the region. These are as follows:

1. Eurobodalla/Bega Valley
2. Shoalhaven/Kiama
3. Shellharbour/Wollongong

Combining the LGAs in this manner expands the sample compared to single LGA. This increases the amount of valid data that can be harvested for a single 12 month period (in this case year ending June 2016). This does not mean all estimates are available for all profile variables for all sub-regions. Where sample sizes associated with estimates are lower than the required minimum data has been withheld (cells have been shaded grey). In these cases, it can be safely assumed that the profile characteristic is not significant. See the sample table below.

<i>Travel Party Type</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Travelling alone	13%		17%
Adult couple	31%	31%	29%
Family group - parents and children	28%	28%	27%
Friends or relatives - with children	7%		6%
Friends or relatives - without children	18%	22%	19%

Estimates for Travelling Alone and Friends/Relatives travelling with children for Mid-Northern have not been included due to low sample size. It can be assumed that they are relatively insignificant.

¹ The full content, methodology and technical parameters are available online via the Tourism Research Australia website.

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5.1 Domestic Overnight Visitor Profile

5.1.1 Region of Origin

ORIGIN REGION	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Canberra	29%	5%	
Sydney	20%	54%	42%
South Coast	11%	14%	
Melbourne	8%		
Capital Country	7%		
Other & not allocated above	25%	26%	58%
TOTAL	100%	100%	100%

Table 6: Region of Origin – Domestic Overnight Visitors 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.2 Main purpose of visit

PURPOSE	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Holiday	69%	64%	36%
Visiting relatives	18%	22%	37%
Visiting friends	6%	9%	15%
Business	5%	4%	12%
Other	2%	0.4%	0%
TOTAL	100%	100%	100%

Table 7: Main Reason for Visit - Domestic Overnight Visitors –2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.3 Travel Party

TRAVEL PARTY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Travelling alone	14%	17%	29%
Adult couple	29%	30%	27%
Family group - parents & kids	26%	25%	21%
Friends or relatives together - with kids	6%	9%	
Friends or relatives together - no kids	22%	19%	14%
Other & not available above	2%	1%	9%
TOTAL	100%	100%	100%

Table 8: Travel Party Types - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

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5.1.4 Length of Stay

NIGHTS	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
1 night	15%	23%	42%
2 nights	30%	30%	28%
3 nights	18%	22%	15%
4 - 7 nights	27%	20%	12%
8 - 14 nights	9%	4%	
Other & not allocated above	2%	1%	3%
TOTAL	100%	100%	100%

Table 9: Length of Visit - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.5 Accommodation

TYPE OF ACCOMMODATION	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Hotel/resort/motel or motor Inn	21%	13%	30%
Rented house/apartment/flat or unit	13%	14%	
CVan park or comm. camping ground	21%	18%	
Other commercial accommodation			
Own property	10%	12%	
Friends or relatives property	27%	35%	49%
Other non commercial property		6%	
Other & not allocated above	9%	2%	21%
TOTAL	100%	100%	100%

Table 10: Accommodation Types – Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

TYPE OF ACCOMMODATION	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Hotel/resort/motel or motor Inn	13%	8%	22%
Rented house/apartment/flat or unit	15%	15%	
CVan park or comm. camping ground	23%	28%	
Other commercial accommodation			
Own property	14%	11%	
Friends or relatives property	25%	33%	48%
Other non commercial property		4%	
Other & not allocated above	10%	2%	30%
TOTAL	100%	100%	100%

Table 11: Accommodation Types – Domestic Overnight Visitor Nights - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

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5.1.6 Month

MONTH	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
January	20%	17%	9%
February	9%	8%	7%
March	11%	11%	10%
April	8%	10%	9%
May	6%	6%	6%
June	3%	9%	9%
July	4%	5%	7%
August	5%	6%	6%
September	7%	6%	10%
October	8%	6%	9%
November	9%	9%	12%
December	9%	6%	7%
Total	100%	100%	100%

Table 12: Month Returned from Trip - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.7 Day of week

DAY OF WEEK RETURNED	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Sunday	32%	37%	37%
Monday	17%	22%	10%
Tuesday	12%	9%	10%
Wednesday	7%	6%	12%
Thursday	9%	8%	11%
Friday	11%	8%	8%
Saturday	12%	9%	11%
Total	100%	100%	100%

Table 13: Day of Week Returned from Trip - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.8 Activities

ACTIVITY CATEGORY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Outdoor/nature	64%	61%	38%
Active outdoor/sports	41%	35%	21%
Arts/heritage	14%	9%	7%
Local attractions/tourist activities	27%	21%	7%
Social activities	87%	85%	87%
Total	NA	NA	NA

Table 14: Activity Category - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

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ACTIVITY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Eat out / dine at a restaurant and/or cafe	60%	57%	51%
Go to the beach	58%	51%	34%
Visit friends & relatives	32%	43%	52%
Sightseeing/looking around	31%	24%	17%
Go shopping for pleasure	22%	24%	19%
Pubs, clubs, etc	20%	21%	24%
Fishing	19%	12%	
Go to markets	17%	14%	
Visit national parks / state parks	14%	11%	
Picnics or BBQs	10%	10%	
Total	NA	NA	NA

Table 15: Significant specific activities- Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.9 Age Group

AGE GROUP	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
15-19			
20-24		8%	10%
25-29		6%	14%
30-34	7%	8%	
35-39	10%	7%	
40-44	13%	10%	
45-49	7%	9%	7%
50-54	8%	13%	11%
55+	35%	35%	28%
Other & not allocated above	19%	4%	30%
Total	100%	100%	100%

Table 16: Age Group - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.1.10 Gender

GENDER	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Male	50%	47%	45%
Female	50%	53%	55%
Total	100%	100%	100%

Table 17: Gender - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

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5.1.11 Household Income

HOUSEHOLD INCOME	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
\$1-\$9,999			
\$10,000-\$24,999		3%	
\$25,000-\$39,999	11%	8%	
\$40,000-\$54,999	7%	9%	
\$55,000-\$69,999	10%	10%	20%
\$70,000-\$84,999	7%	8%	21%
\$85,000-\$99,999	12%	5%	
\$100,000-\$114,999	13%	9%	20%
\$115,000-\$129,999	9%	8%	
\$130,000-\$149,999	12%	12%	
\$150,000-\$174,999		8%	
\$175,000-\$199,999	8%		
\$200,000+	13%	19%	39%
Total	100%	100%	100%

Table 18: Household Income - Domestic Overnight Visitors - 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.2 Domestic Day Visitor Profile

Domestic day visitors are defined as those who travel for a round trip distance of at least 50 kilometers, are away from home for at least four hours and do not spend a night away from home. Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home. As with domestic overnight visitors, day visit questions in the NVS are asked of those 15 years of age and above.

The significance of day visitors is often undervalued. Some destinations go as far as to ignore them. This can prove a very costly error of judgement for several reasons:

1. Day visitors may be the same people who also visit the destination on overnight trips. These people are 'using' the same destination for different trip types. Their day visit is an important part of 'destination bonding' and building brand-loyalty.
2. Compared to overnight trips, day visitors require less commitment in terms of both time and money. This increases the chance that a destination will be 'sampled' by first time visitors. This, in turn, increases the chances of conversion into overnight visitors at a later date.
3. Day visitors spend much more per trip than is often thought. For most places within reasonable proximity to large population sources, day visitor expenditure is a crucial element of the visitor economy.

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Fewer profile breakdowns have been undertaken for day visitors given the less complex nature of day trips.

5.2.1 Origin

ORIGIN	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Sydney		48%	75%
Other NSW	71%	49%	24%
Other (mainly ACT)	29%	3%	2%
Total	100%	100%	100%

Table 19: Origin of Domestic Day Visitors – 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.2.2 Purpose of Trip

PURPOSE	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Holiday	59%	60%	48%
Visiting friends and relatives		25%	29%
Business			10%
Other & not allocated above	41%	15%	12%
Total	100%	100%	100%

Table 20: Main Purpose of Visit of Domestic Day Visitors – 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

5.2.3 Age

AGE GROUP	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
15-34	28%	39%	33%
35-54	32%	28%	37%
55+	40%	34%	29%
Total	100%	100%	100%

Table 21: Age Visit of Domestic Day Visitors – 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

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5.2.4 Activities

ACTIVITY CATEGORY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Outdoor/nature	34%	35%	37%
Active outdoor/sports		16%	10%
Arts/heritage		7%	7%
Local attractions/tourist activities		13%	
Social activities	81%	81%	80%

Table 22: Activity Types of Domestic Day Visitors – 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

SPECIFIC ACTIVITY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Eat out / dine at a restaurant and/or cafe	52%	50%	53%
Go to the beach	26%	24%	30%
Go shopping for pleasure	24%	15%	13%
Visit friends & relatives	22%	28%	32%
Sightseeing/looking around		23%	18%

Table 23: Significant specific activities - Domestic Day Visitors – 2015/16

Data Source: Tourism Research Australia; National Visitor Survey (2015, 2016)

Note: No other specific activities have large enough sample sizes to be included.

5.3 International Overnight Visitors

This section relates to international visitors that spent at least one a defined LGA sub-region. International day visitors (i.e. those that do not spend at least one night in a sub-region) are not included as there is no way to identify these visitors.

5.3.1 Country of Origin

COUNTRY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
United Kingdom	17%	25%	12%
Germany	13%	6%	7%
United States of America	17%	14%	13%
China			17%
Other & not allocated above	53%	56%	51%
TOTAL	100%	100%	100%

Table 24: Country of Residence - International Overnight Visitors – 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

Note: No other specific countries have large enough sample sizes to be included for 2015/16

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Visitor Volumes - Visitor Profile – Visitor Expenditure – Tourism-dependent Jobs
ESTIMATES FOR THE YEAR ENDING 30 JUNE 2016.

COUNTRY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
United Kingdom	21%	32%	3%
Germany	12%	9%	3%
United States of America	15%	16%	8%
China			20%
Other & not allocated above	51%	43%	67%
TOTAL	100%	100%	100%

Table 25: Country of Residence - International Visitor Nights – 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

Note: No other specific countries have large enough sample sizes to be included for 2015/16

5.3.2 Main Purpose of Visit

PURPOSE	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Holiday	80%	70%	44%
Visiting friends and relatives	16%	24%	35%
Education			15%
Other & not allocated above	4%	6%	5%
TOTAL	100%	100%	100%

Table 26: Main Purpose of Visit - International Overnight – 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

5.3.3 Length of Stay

LENGTH OF STAY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
1- 7 nights	86%	77%	52%
8 - 14 nights	7%	10%	19%
15 - 30 nights			6%
31 or more nights			23%
Other & not allocated above	7%	13%	0%
TOTAL	100%	100%	100%

Table 27: Length of Stay - International Overnight Visitors – 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

EUROBODALLA SHIRE

Visitor Volumes - Visitor Profile – Visitor Expenditure – Tourism-dependent Jobs
ESTIMATES FOR THE YEAR ENDING 30 JUNE 2016.

5.3.4 Accommodation

ACCOMMODATION	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Hotels and similar accommodation	36%	25%	24%
Caravan park or commercial camping area	20%	11%	9%
Friends or relatives property	21%	26%	46%
Caravan or camping - non commercial	9%		
Other & not allocated above	14%	38%	21%
TOTAL	100%	100%	100%

Table 28: Accommodation Types - International Overnight Visitors 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

5.3.5 Travel Party

TRAVEL PARTY	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
Unaccompanied traveller	43%	51%	56%
Adult couple	38%	34%	23%
Family group - parent(s) and children	11%		12%
Friends and/ or relatives travelling together	9%	9%	7%
Other & not allocated above	0%	6%	2%
TOTAL	100%	100%	100%

Table 29: Travel Party Types - International Overnight Visitors 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

5.3.6 Age Group

AGE GROUP	Eurobodalla & Bega Valley	Shoalhaven & Kiama	Shellharbour & Wollongong
15-24	14%	13%	26%
25-34	21%	22%	26%
35-44	12%		11%
45-54			
55+	42%	37%	28%
Other & not allocated above	11%	27%	9%
TOTAL	100%	100%	100%

Table 30: Age Group - International Overnight Visitors 2015/16

Data Source: Tourism Research Australia; International Visitor Survey (2015, 2016)

EUROBODALLA SHIRE

Visitor Volumes - Visitor Profile – Visitor Expenditure – Tourism-dependent Jobs
ESTIMATES FOR THE YEAR ENDING 30 JUNE 2016.

6. ADDITIONAL NOTES

The visitor volume and profile data presented in this document are not actuals. They are derived from sample surveys which means that they cannot avoid sample survey error. Data below what is considered minimum acceptable sample sizes have been withheld.

Visitor expenditures are modelled visitor expenditures using TRA's expenditure allocation methodology. Whilst this has been applied at State and Regional level for many years it, as with visitor volume, is not an actual register of visitor expenditure. It should be remembered that these expenditures are gross. In other words, they do not attempt to account for the costs associated with supplying the goods and services purchased.

Employment estimates use ratios implicit in the Regional Tourism Satellite (TSA) Accounts and apply these to the Local Government level. Whilst a significant improvement on using State TSA this means it is assumed the local economy has the same characteristics as the Region.

The reason the estimates of all measures have been presented is that they represent the best available up-to-date estimates. Addressing these limitations would require expenditure well beyond the financial capacity of any Council, or Council/Industry partnership. The alternative to estimates such as those prepared in this document are, therefore, to have no estimates. Readers are encouraged to explore the methodology of the data sources and that applied in this document and accept the estimates as a contribution to a better understanding of the size, significance, and profile of tourism in the Eurobodalla LGA for the year ending June 2016.

