

EUROBODALLA TOURISM MONITOR

Monitoring Eurobodalla Local Government Area
Visitation and Market Share.

Year ending December 2016

An independent report prepared for Eurobodalla Council using
Australia's official sources of tourism data.



TOURISM STRATEGY DEVELOPMENT SERVICES

TOURISM MARKET RESEARCH ANALYSIS & STRATEGY
DEVELOPMENT

Est 1995. ABN: 78661014505



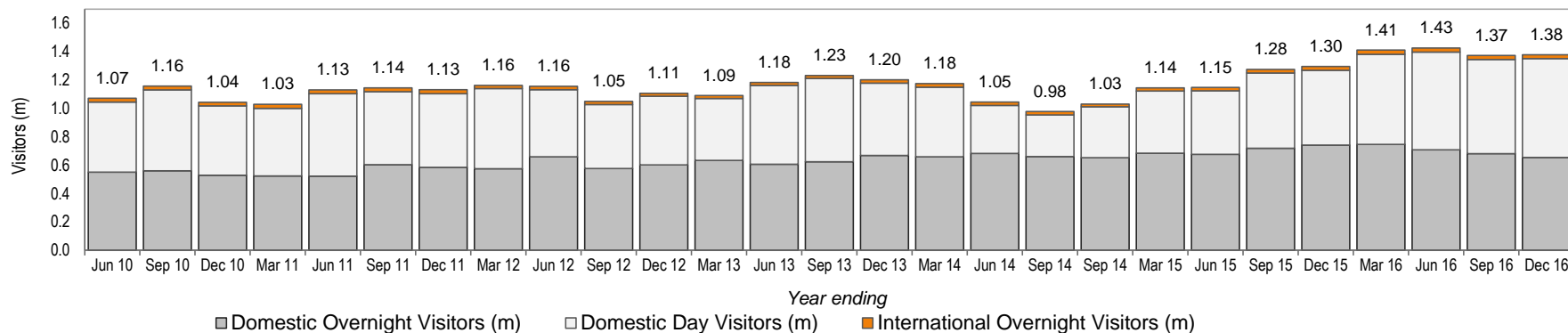
Eurobodalla Tourism Monitor

Year Ending December 2016



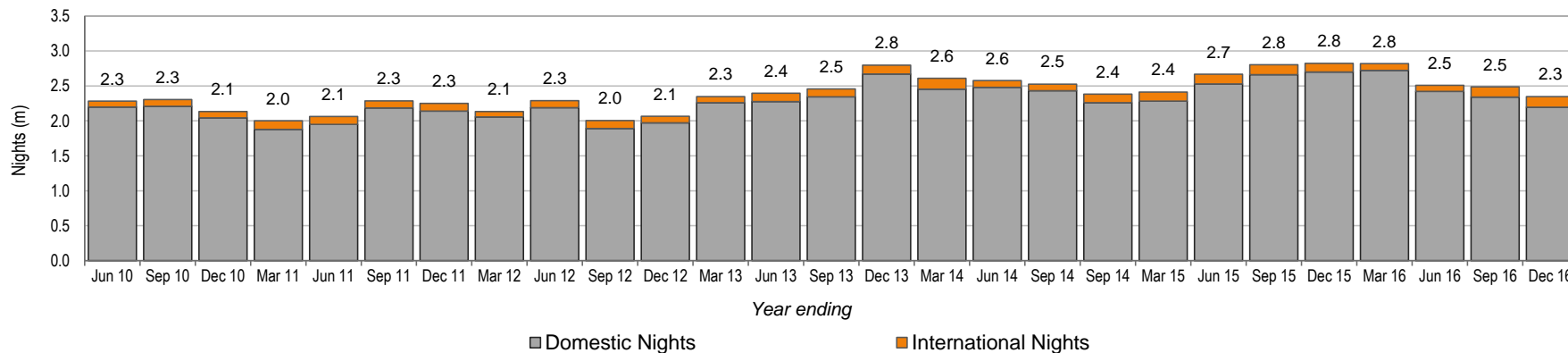
VISITOR SUMMARY

Year ending >	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Domestic Overnight Visitors (m)	0.55	0.56	0.53	0.52	0.52	0.60	0.58	0.57	0.66	0.58	0.60	0.63	0.61	0.62	0.67	0.66	0.68	0.66	0.65	0.68	0.68	0.72	0.74	0.75	0.71	0.68	0.65
Domestic Day Visitors (m)	0.49	0.57	0.49	0.48	0.58	0.51	0.52	0.57	0.47	0.45	0.49	0.44	0.56	0.59	0.51	0.49	0.34	0.29	0.36	0.44	0.45	0.53	0.53	0.64	0.69	0.66	0.70
International Overnight Visitors (m)	0.027	0.028	0.025	0.029	0.027	0.026	0.027	0.022	0.023	0.022	0.021	0.020	0.020	0.022	0.024	0.025	0.025	0.023	0.020	0.022	0.023	0.025	0.027	0.029	0.028	0.028	0.028
TOTAL VISITORS (m)	1.07	1.16	1.04	1.03	1.13	1.14	1.13	1.16	1.16	1.05	1.11	1.09	1.18	1.23	1.20	1.18	1.05	0.98	1.03	1.14	1.15	1.28	1.30	1.41	1.43	1.37	1.38
Change vs same period prev. year	-16%	-3%	-14%	-9%	5%	-1%	8%	13%	2%	-8%	-2%	-6%	2%	17%	9%	8%	-12%	-21%	-14%	-3%	10%	30%	26%	23%	24%	8%	6%



NIGHTS SUMMARY

Period ending >	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Domestic Nights	2.2	2.2	2.0	1.9	2.0	2.2	2.1	2.1	2.2	1.9	2.0	2.3	2.3	2.3	2.7	2.5	2.5	2.4	2.3	2.3	2.5	2.7	2.7	2.7	2.4	2.3	2.2
International Nights	0.08	0.10	0.09	0.12	0.11	0.10	0.11	0.08	0.10	0.11	0.09	0.09	0.12	0.11	0.13	0.15	0.09	0.09	0.12	0.13	0.14	0.14	0.12	0.10	0.09	0.15	0.15
TOTAL NIGHTS	2.3	2.3	2.1	2.0	2.1	2.3	2.3	2.1	2.3	2.0	2.1	2.3	2.4	2.5	2.8	2.6	2.6	2.5	2.4	2.4	2.7	2.8	2.8	2.8	2.5	2.5	2.3
Change vs same period prev. year	-9%	-2%	-8%	-14%	-10%	-1%	5%	7%	11%	-12%	-8%	10%	5%	23%	35%	11%	8%	3%	-15%	-8%	4%	11%	18%	17%	-6%	-11%	-17%



Data source: Unpublished data-extracted from Tourism Research Australia's International Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold.

PLEASE NOTE: As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data therefore has degree of sample survey error. Calculations involving more than one data points are also affected.

Eurobodalla Tourism Monitor

Year Ending December 2016



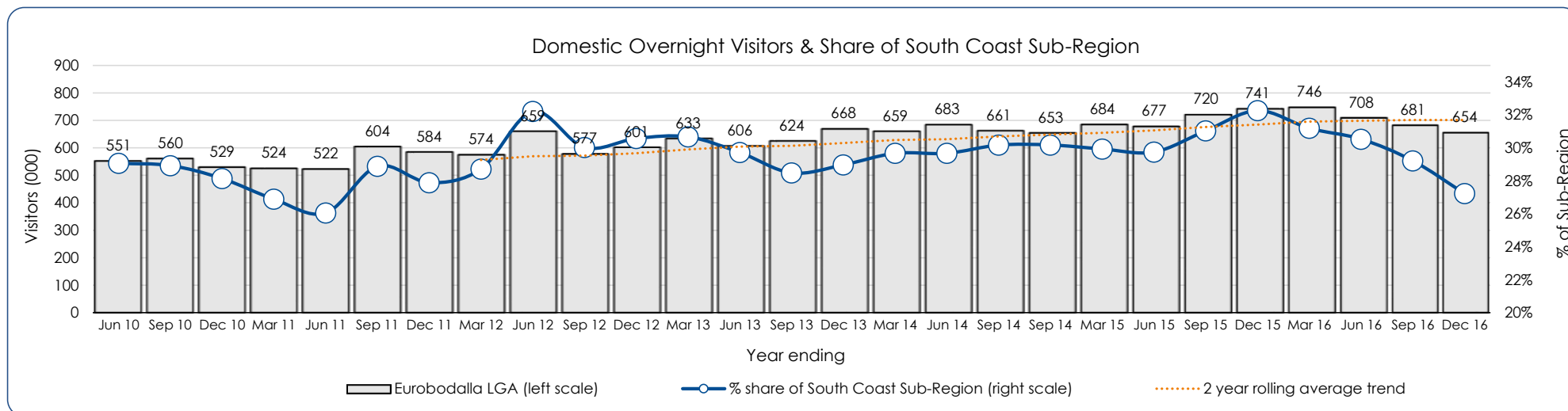
Domestic Overnight Visitor Estimates

Year ending>	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Eurobodalla LGA (000)	551	560	529	524	522	604	584	574	659	577	601	633	606	624	668	659	683	661	653	684	677	720	741	746	708	681	654
Change vs same period prev. year*	-18.6%	-10.1%	-15.1%	-6.6%	-5.3%	7.9%	10.4%	9.5%	26.2%	-4.5%	2.9%	10.3%	-8.0%	8.1%	11.1%	4.1%	12.7%	5.9%	-2.2%	3.8%	-0.9%	8.9%	13.5%	9.1%	4.6%	-5.4%	-11.7%
Is the above statistically significant?	1,896	1,936	1,880	1,949	2,004	2,091	2,094	1,999	2,046	1,922	1,966	2,064	2,039	2,191	2,306	2,221	2,302	2,191	2,164	2,285	2,276	2,320	2,297	2,392	2,319	2,331	2,402
South Coast Sub Region (000)	-11.0%	-5.8%	-7.0%	-0.8%	5.7%	8.0%	11.4%	2.6%	2.1%	-8.1%	-6.1%	3.3%	-0.3%	14.0%	17.3%	7.6%	12.9%	0.0%	-6.2%	2.9%	-1.1%	5.9%	6.1%	4.7%	1.9%	0.5%	4.6%
Change vs same period prev. year*	29.1%	28.9%	28.1%	26.9%	26.0%	28.9%	27.9%	28.7%	32.2%	30.0%	30.6%	30.7%	29.7%	28.5%	29.0%	29.7%	29.7%	30.2%	30.2%	29.9%	29.7%	31.0%	32.3%	31.2%	30.5%	29.2%	27.2%

Above average

*Refer key points for assessment of statistical significance

South Coast Sub Region = Shoalhaven, Eurobodalla and Bega Valley LGAs.



Data source: Unpublished data-extracted from Tourism Research Australia's National Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold.

As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data, therefore, has degree of sample survey error. Calculations involving more than one data point are also affected by this.

KEY POINTS FOR THE YEAR ENDING DECEMBER 2016:

- The latest estimate of 654,000 domestic overnight visitors remains in the above average zone but, as with the year ending September 2016 estimate, it is lower than the same period last year.
- The 'on-paper' change of -11.7% is not considered statistically significant and caution should be applied to its interpretation. Despite this, it appears to be an extension of a declining trend from a high point in the year ending March 2016.
- South Coast Sub-Region domestic overnight visitor volume was higher than in the year ending December 2015.
- Eurobodalla's share of the South Coast Sub-Region has fallen to below average levels. The latest share represents the fourth consecutive share decline. It is also one of the lowest shares in the Monitor.
- The 2 year rolling average trendline (made up of eight rolling year end periods) has flattened out.
- Parallel declining trends in visitor volume AND share are cause for a moderate level of concern as it suggests that declining visitor volume is not simply a reflection of broader market movement. Further investigation is recommended.

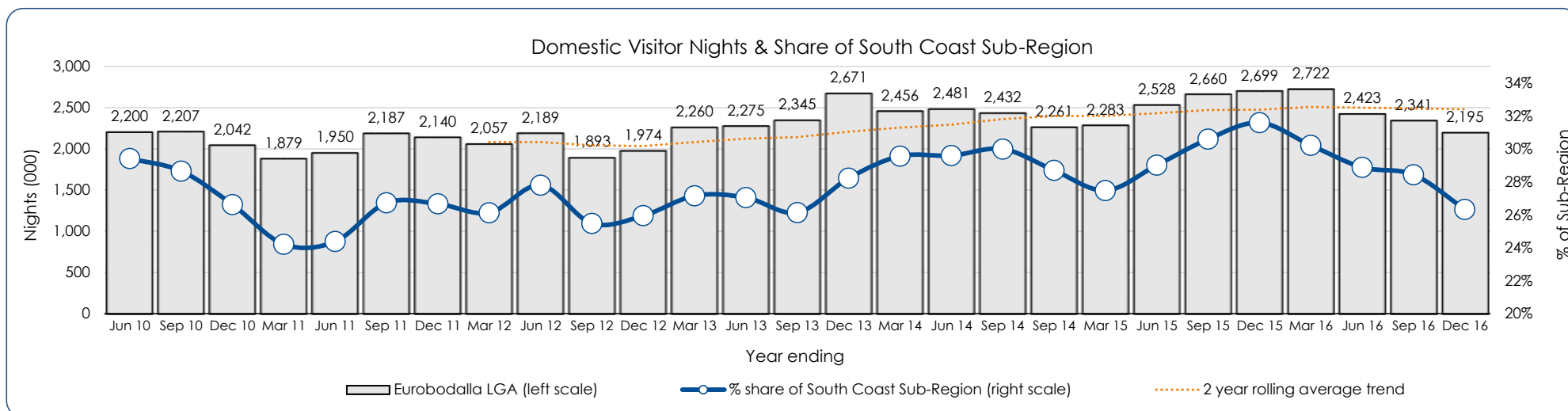
Domestic Visitor Nights Estimates

YEAR ENDING	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Eurobodalla LGA (000)	2,200	2,207	2,042	1,879	1,950	2,187	2,140	2,057	2,189	1,893	1,974	2,260	2,275	2,345	2,671	2,456	2,481	2,432	2,261	2,283	2,528	2,660	2,699	2,722	2,423	2,341	2,195
Change vs same period prev. year*	-9.2%	-3.2%	-8.5%	-16.9%	-11.4%	-0.9%	4.8%	9.5%	12.3%	-13.4%	-7.8%	9.9%	3.9%	23.9%	35.3%	8.7%	9.1%	3.7%	-15.4%	-7.0%	1.9%	9.4%	19.4%	19.2%	-4.2%	-12.0%	-18.7%
South Coast Sub Region (000)	7,481	7,703	7,672	7,762	7,999	8,184	8,027	7,875	7,875	7,432	7,609	8,323	8,412	8,973	9,465	8,309	8,385	8,110	7,880	8,310	8,715	8,696	8,545	9,009	8,391	8,234	8,339
Change vs same period prev. year*	-9.4%	-3.8%	0.1%	1.2%	6.9%	6.2%	4.6%	1.5%	-1.6%	-9.2%	-5.2%	5.7%	6.8%	20.7%	24.4%	-0.2%	-0.3%	-9.6%	-16.7%	0.0%	3.9%	7.2%	8.4%	8.4%	-3.7%	-5.3%	-2.4%
% share of South Coast Sub Region	29.4%	28.7%	26.6%	24.2%	24.4%	26.7%	26.7%	26.1%	27.8%	25.5%	25.9%	27.2%	27.0%	26.1%	28.2%	29.6%	29.6%	30.0%	28.7%	27.5%	29.0%	30.6%	31.6%	30.2%	28.9%	28.4%	26.3%

Above average

*Refer key points for assessment of statistical significance

South Coast Sub Region = Shoalhaven, Eurobodalla and Bega Valley LGAs.



Data source: Unpublished data-extracted from Tourism Research Australia's National Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold.

As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data, therefore, has degree of sample survey error. Calculations involving more than one data point are also affected by this.

KEY POINTS FOR THE YEAR ENDING DECEMBER 2016:

- Domestic overnight visitors spent an estimated 2.2 million nights in Eurobodalla LGA in the year ending December 2016. This volume is below average compared to all other periods in the Monitor and one of the lowest in recent years.
- The estimate is 500,000 lower than the year ending December 2015. Whilst the change is not considered statistically significant it is the third consecutive period on period decline. This suggests a decline is not simply the result of sample survey error.
- Domestic visitor nights volume in the South Coast Sub-Region nights volume was also estimated to be lower than the same period last year. The current trend suggests it may contract in the YE December 2016.
- Eurobodalla's share of the Sub-Region was marginally lower than it was in the year ending December 2015 - although the percentage change was much less than for Eurobodalla LGA.
- As suggested in the Year Ending September Monitor it may be wise to examine the Sub-Region visitor profile over recent periods to see if any particular market segment or source market is causing the decline. Given the latest estimates, and the trends they extend, it is highly recommended that this, or similar analysis, is undertaken.

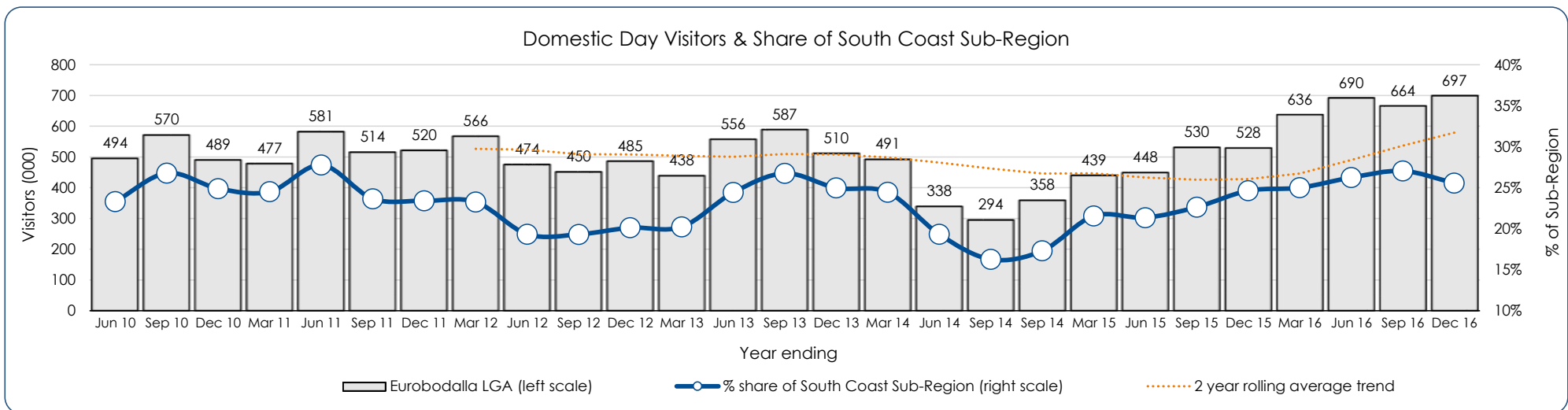
Eurobodalla Tourism Monitor

Year Ending December 2016

Domestic Day Visitor Estimates

YEAR ENDING	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	
Eurobodalla LGA (000)	494	570	489	477	581	514	520	566	474	450	485	438	556	587	510	491	338	294	358	439	448	530	528	636	690	664	697
Change vs same period prev. year*	-13.8%	4.2%	-13.1%	-11.3%	17.6%	-9.8%	6.3%	18.7%	-18.4%	-12.5%	-6.7%	-22.6%	17.3%	30.4%	5.2%	12.1%	-39.2%	-49.9%	-29.8%	-10.6%	32.5%	80.3%	47.5%	44.9%	54.0%	25.3%	32.0%
South Coast Sub Region (000)	2,120	2,128	1,964	1,946	2,092	2,173	2,221	2,433	2,452	2,330	2,410	2,165	2,277	2,194	2,042	2,009	1,749	1,807	2,068	2,036	2,098	2,341	2,143	2,544	2,629	2,456	2,725
Change vs same period prev. year*	3.7%	0.2%	-8.5%	-10.5%	-1.3%	2.1%	13.1%	25.0%	17.2%	7.2%	8.5%	-11.0%	-7.1%	-5.8%	-15.3%	-7.2%	-23.2%	-17.6%	1.3%	1.3%	20.0%	29.6%	3.6%	25.0%	25.3%	4.9%	27.2%
% share of South Coast Sub Region	23.3%	26.8%	24.9%	24.5%	27.8%	23.7%	23.4%	23.3%	19.3%	19.3%	20.1%	20.2%	24.4%	26.8%	25.0%	24.4%	19.3%	16.3%	17.3%	21.6%	21.4%	22.6%	24.6%	25.0%	26.2%	27.0%	25.6%

Above average
 *Refer key points for assessment of statistical significance
South Coast Sub Region = Shoalhaven, Eurobodalla and Bega Valley LGAs.



Data source: Unpublished data-extracted from Tourism Research Australia's National Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold. As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data, therefore, has degree of sample survey error. Calculations involving more than one data point are also affected by this.

KEY POINTS FOR THE YEAR ENDING DECEMBER 2016:

- Eurobodalla hosted and estimated 697,000 domestic day visitors is 664,000 in the year ending December 2016. This is well above the Monitor average and a Monitor high-point.
- This represents a 32% increase over the same period last year - a statistically significant change.
- Domestic day visitor volume in the South Coast Sub-Region increased at similar levels to Eurobodalla, pushing this volume toward s 3 million.
- Eurobodalla's share of the Sub-Region was higher than the year ending December 2015; but lower than the year ending September 2016. The positive trend in market share over the recent periods has - for now at least - come to an end.
- Whether or not these above average levels of domestic day visitors results in an increase in domestic overnight visitors levels remains to be seen. If this were to occur, it would be anticipated that some evidence of this would be seen in the year ending March 2017 and year ending June 2017.
- Should this not occur, it is suggested added importance be placed on investigating the cause of current trends in domestic overnight visitors.

Eurobodalla Tourism Monitor

Year Ending December 2016

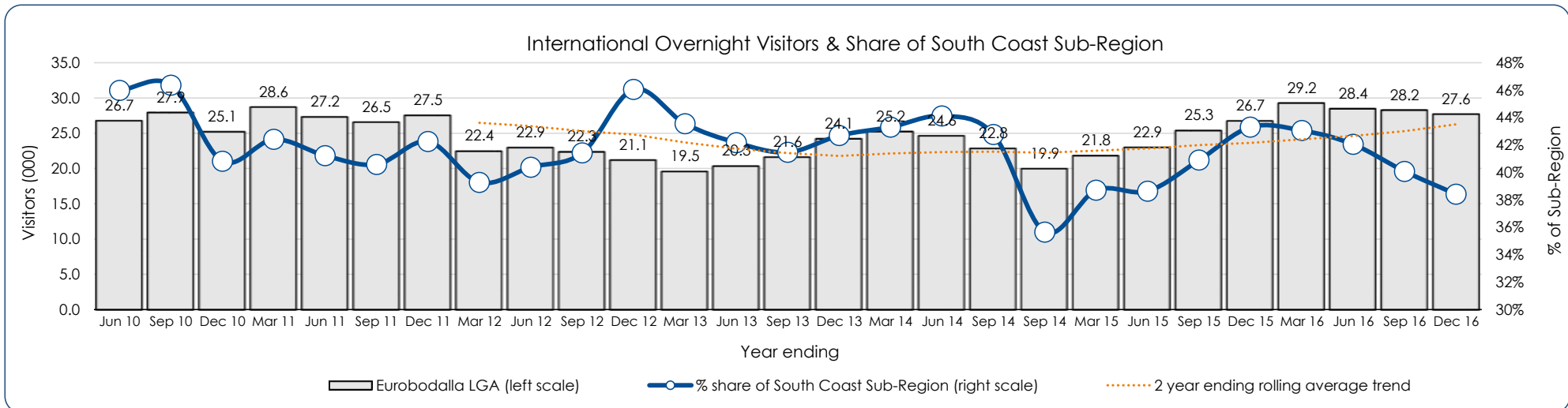


International Overnight Visitor Estimates

All dates are year ending

	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Sep 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Eurobodalla LGA (000)	26.7	27.9	25.1	28.6	27.2	26.5	27.5	22.4	22.9	22.3	21.1	19.5	20.3	21.6	24.1	25.2	24.6	22.8	19.9	21.8	22.9	25.3	26.7	29.2	28.4	28.2	27.6
Change vs same period prev. year*	5%	15%	-9%	4%	2%	-5%	9%	-22%	-16%	-16%	-23%	-13%	-11%	-3%	14%	29%	21%	6%	-17%	-13%	-7%	11%	34%	34%	24%	11%	4%
South Coast Sub Region (000)	58.0	60.1	61.6	67.4	66.0	65.2	65.0	57.0	56.7	53.9	45.9	44.8	48.1	52.0	56.6	58.1	55.6	53.3	55.9	56.3	59.3	61.9	61.5	67.8	67.5	70.3	71.9
Change vs same period prev. year*	4%	15%	6%	13%	14%	9%	6%	-15%	-14%	-17%	-29%	-21%	-15%	-3%	23%	30%	16%	2%	-1%	-3%	7%	16%	10%	20%	14%	14%	17%
% share of South Coast Sub Region	46%	46%	41%	42%	41%	41%	42%	39%	40%	41%	46%	44%	42%	41%	43%	43%	44%	43%	36%	39%	39%	41%	43%	43%	42%	40%	38%

Above average
 *Refer key points for assessment of statistical significance
South Coast Sub Region = Shoalhaven, Eurobodalla and Bega Valley LGAs.



Data source: Unpublished data-extracted from Tourism Research Australia's International Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold.

As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data, therefore, has degree of sample survey error. Calculations involving more than one data point are also affected by this.

KEY POINTS FOR THE YEAR ENDING DECEMBER 2016:

- The latest year ending International overnight visitor estimate was 27,600. This remains in the above-average zone.
- The percentage change compared to the year ending December 2015 was positive (on paper). Although not considered a statistically significant change, it seems clear that the rate of growth has gradually slowed over recent periods.
- International overnight visitor volume in the South Coast Sub-Region was considerable higher than in the year ending December 2015.
- Eurobodalla's share of the Sub-Region returned to below average levels. The latest share represents the fourth consecutive negative share shift.
- The two year rolling average trendline remains positive, although there has been very little change in the gently rolling nature of this moving average over recent years.
- The lower importance of international visitors compared to domestic visitors means that investigation of the decline is not necessarily required. It is worth noting, however, that a similar pattern of decline exists for domestic overnight visitors.

Eurobodalla Tourism Monitor

Year Ending December 2016

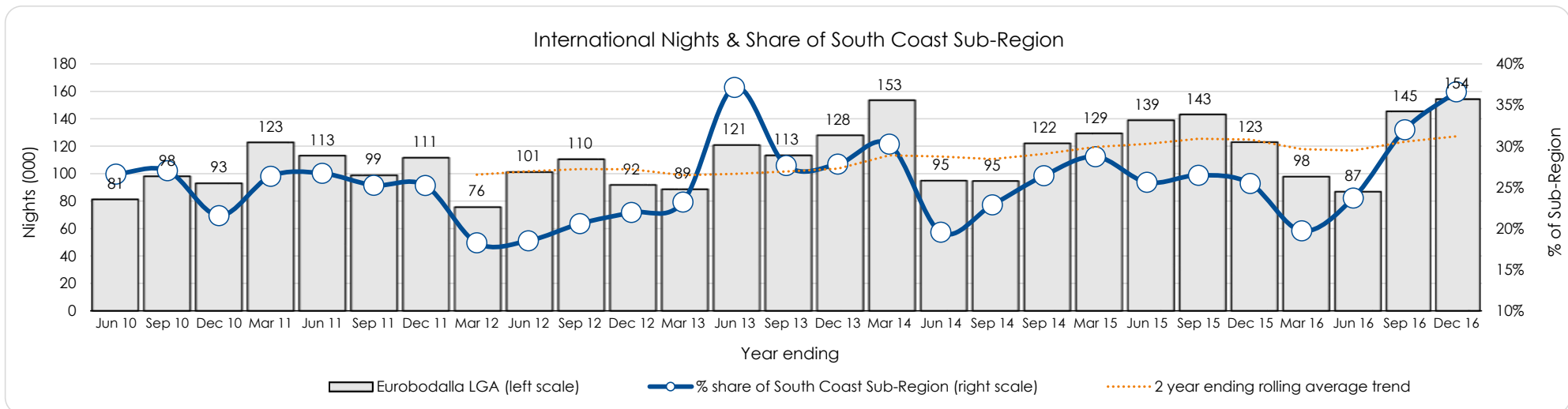


International Nights Estimates

All dates are year ending

	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Sep 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16
Eurobodalla LGA (000)	81	98	93	123	113	99	111	76	101	110	92	89	121	113	128	153	95	95	122	129	139	143	123	98	87	145	154
% change vs same period prev. year*	-7%	25%	5%	66%	39%	1%	20%	-38%	-11%	12%	-18%	17%	19%	2%	39%	73%	-21%	-16%	-5%	-16%	46%	51%	1%	-24%	-37%	2%	25%
South Coast Sub Region (000)	306	363	431	466	423	391	442	415	546	536	418	381	325	409	459	507	485	414	462	450	541	540	482	496	367	454	421
% change vs same period prev. year	-1%	36%	62%	52%	38%	8%	2%	-11%	29%	37%	-5%	-8%	-41%	-24%	10%	33%	49%	1%	1%	-11%	12%	30%	4%	10%	-32%	-16%	-13%
% share of South Coast Sub Region	26.6%	27.0%	21.6%	26.3%	26.7%	25.3%	25.2%	18.3%	18.5%	20.6%	21.9%	23.2%	37.2%	27.7%	27.8%	30.2%	19.5%	22.9%	26.4%	28.7%	25.6%	26.5%	25.5%	19.7%	23.7%	32.0%	36.6%

Above average
 *Refer key points for assessment of statistical significance
South Coast Sub Region = Shoalhaven, Eurobodalla and Bega Valley LGAs.



Data source: Unpublished data-extracted from Tourism Research Australia's International Visitor Survey. Copyright remains with the Commonwealth of Australia. Data cannot be sold.
 As it is not possible to conduct an actual count of visitors or nights for any destination, a survey method is required to produce estimates. All data, therefore, has degree of sample survey error. Calculations involving more than one data point are also affected by this.

KEY POINTS FOR THE YEAR ENDING DECEMBER 2016:

- The latest International overnight visitor nights estimate of 154,000 is the highest in the Monitor time period.
- This estimate is, on-paper, above that of the year ending December 2015 is positive. It does not pass rigorous or more relaxed statistical significance tests. Caution should be applied in the interpretation of this estimate.
- In contrast, international visitor nights volume in the South Coast Sub-Region was lower than in the year ending December 2015. This was the third consecutive period-on-period decline for the Sub-Region.
- The combined movements in Eurobodalla and the Sub-Region volume sees Eurobodalla's share of South Coast Sub-Region nights reach a record high of 36%. Whilst a positive outcome on paper, the sample error associated with annual visitor nights data means that it should be interpreted as an estimate.
- Given there is some evidence to suggest a trend is forming, as suggested in the Year Ending September Monitor it may be useful to canvass local industry stakeholders with the view of identifying any obvious cause.

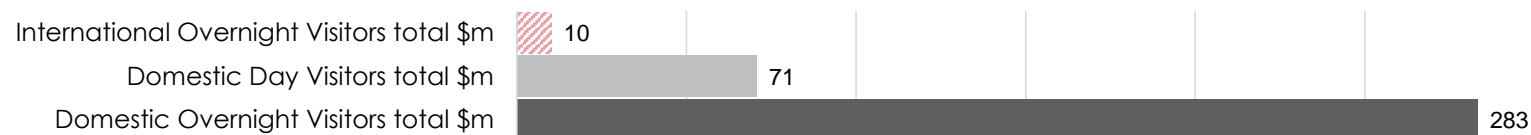
EXPENDITURE APPENDIX

IMPORTANT NOTE:

Expenditure data is collected in the National and International Visitor Survey's at a trip level; not for specific destinations. Estimates for specific destinations are the result of the application of Tourism Research Australia's expenditure allocation model. Despite being the best available estimates, this limitation should be acknowledged.

TOTAL ESTIMATED VISITOR EXPENDITURE FOR YE DECEMBER 2016: **364** \$ million

Estimated Expenditure by Visitor Category: Year ending December 2016



TOTAL EXPENDITURE

	<u>Dec 16</u>
Domestic Overnight Visitors total \$m	283
Domestic Day Visitors total \$m	71
International Overnight Visitors total \$m	10
TOTAL \$m	364

EXPENDITURE PER VISIT

	<u>YEAR ENDING> Dec 16</u>
Domestic Overnight Visitors \$ per visit	\$433
Domestic Day Visitors \$ per visit	\$101
International Overnight Visitors \$ per visit	\$365

EXPENDITURE PER NIGHT

	<u>YEAR ENDING> Dec 16</u>
Domestic Overnight Visitors \$ per night	\$129
International Overnight Visitors \$ per night	\$73