Fin Year 2018/19

Eurobodalla Tourism Monitor

DESTINATION RESEARCH

know your potential

November 2019

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The report has been compiled by researchers from Destination Research. The visitation statistics contained this report are based on the sample data collected by Tourism Research Australia (IVS and NVS) and therefore provide an indication of visitor trends rather than actual performance measures. The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required in some areas to validate the findings of this study.

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Introduction

The purpose of this report is to provide analysis of visitor data provided by Tourism Research Australia (TRA) regarding domestic and international visitors. The report provides analysis of data provided by TRA that is relevant to the Eurobodalla destination, and organising it into simplified reports. The data to be analysed includes the following 10 variables across domestic and international data:

1. Visitor numbers
2. Visitor nights and average length of stay
3. Purpose of trip
4. Age groups
5. Source markets
6. Key activities
7. Accommodation – B & B, hotel, camping
8. Lifecycle groups - families, couples, singles
9. Transport and/or place of arrival
10. Travel party type (package, backpackers).

TRA conducts statistically reliable surveys of domestic travellers over the phone asking for details of travel undertaken throughout Australia, and asking for the destination and activities of travellers. This provides a pattern of where visitors are travelling and how much that travel is worth to the economy. The data is reported quarterly, however it is not released to the industry until a few months later. In a separate survey, international travellers are surveyed at airports and cruise terminals to discover their visitation patterns while they are in Australia.

However, the TRA data has known issues particularly when analysing smaller segments of visitors coming to regional areas - where the sample size is small the results can be unreliable. For example the numbers of international heritage tourists in Eurobodalla is a tiny percentage of all international tourists to Australia, and is therefore hard to accurately capture in a large survey. In these cases the research is therefore considered an indication of visitor trends rather than actual performance measures.

Despite the slight variations in smaller segments of data the TRA data is the most reliable source of visitor data available, showing historical data over the past 10 years. The best indicator of the reliability of TRA data is the consistency of the results over time. As shown in this report, the ratios of tourists, their activities and accommodation etc remains fairly constant over both five and ten year timeframes. It is important however to seek further research into specific market segments before basing planning, development or investment decisions on TRA data alone.

Methodology

Data is downloaded from TRA National Visitor Survey and International Visitor Survey and reanalysed by staff at Destination Research. Where possible this is cross-checked with published statistics, and data compiled by DNSW, TRA and other tourism organisations.

I. The analysis utilises TRA subscription data, with most analysis using a five year average.

II. All analysis in this report is undertaken using a financial year (2016/7) however where needed a ten year time series is also shown to examine trends over time. Other analysis by the TRA is undertaken using year-end in September, December and March, providing slightly different reporting of "yearly" results.

III. TRA data is analysed in statistical areas (SA2) which when combined make up the total LGA of Eurobodalla the report is based on:

   a. 101041017 - Batemans Bay
   b. 101041018 - Batemans Bay - South
   c. 101041021 - Broulee - Tomakin
   d. 101041022 - Deua - Wadbilliga
   e. 101041024 - Eurobodalla Hinterland
   f. 101041024 - Moruya - Tuross Head
   g. 101041027 - Narooma (this SA2 also includes Bermagui).

IV. Sample sizes for each data set are shown in this report and it is acknowledged that the data derived from TRA surveys and subject to sample error. The likelihood of sample error is explained by TRA and should be read before drawing any conclusions or inferences, or taking any action, based on the data. Further information on the methodology used by TRA and the extent of sample error can be sourced at http://www.tra.gov.au/aboutus/international-visitor-survey-methodology.html

V. Visitor expenditure data for individual local government areas (LGA), or statistical areas (SA2) is provided yearly by the TRA based on the average of the previous four years.

VI. In 2014, TRA adopted a modified methodology to collect data from domestic visitors which includes accessing Australian residents using mobile phones as well as home phones which caused some small changes to previously published data. The TRA revised estimates for 2014 and 2015 data HAS BEEN included in this report.

VII. In 2018, TRA revised methods for collecting and analyzing international data. This caused some small changes to previously published data. Revised estimates for data prior to 2018 HAS BEEN included in this report.

VIII. Further information on the methodology used by TRA and the extent of sample error can be sourced at https://www.tra.gov.au/International/ivs-methodology.

Eurobodalla Visitor Profile (2018/19)

The following is a brief profile of visitors to Eurobodalla for the financial year 2018/19. Further analysis of the key markets are found in the sections following.

- *Domestic overnight* markets provided an estimated **899,000** visitors for 2.74 million nights.
- *Domestic day trips* provided an estimated **660,000** visitors per year.
- *International markets* provided an estimated **40,000** visitors per year for 122,000 nights.
- The three markets totalled **1.6 million** visitors to Eurobodalla for 2.86 million nights.

Domestic overnight visitors

- Key markets Canberra (25%), Sydney (23%), the South Coast (13%).
- Lifecycle segments include families (31%) and older retired persons (22%).
- Key activities include social activities (39%) and outdoor nature activities (31%).

Domestic day visitors

- Key markets are South Coast (56%), Canberra (25%), Capital Country (8%)
- Lifecycle segments include older retired couples (35%) and families (29%).
- Key activities include social activities (55%) and outdoor/nature activities (25%).

International visitors

- International visitors are mainly from UK (15%), USA (14%), Germany (12%).
- Key activities include social activities (22%) and outdoor/nature activities (21%).
- Backpackers make up 23% of the international market.
- Package tours 5%.

Table 1: Visitor Summary: 2018/19

	Domestic overnight	International	Domestic day trip	Total
Visitors	899,000	40,000	660,000	**1,599,000**
Nights	2,746,000	122,000	^	**2,868,000**
Av night stay	3.1	3.1	^	
Lifecycle	Families with children (31%) Older retired persons (22%)	Older people 55+ (35%) Young people, 20-30yrs (29%)	Older people 55+ (42%) Families with children (29%)	
Activities	1. Social (dining, VFR) 2. Outdoor/nature 3. Active sports	1. Social (dining, sights) 2. Outdoor/nature 3. Local attractions	1. Social (dining, VFR) 2. Outdoor/nature 3. Active sports	
Source markets	Canberra (25%) Sydney (23%) South Coast (13%)	UK/Europe (55%) Nth America (22%) Asia (13%)	South Coast (56%) Canberra (25%) Capital Country (8%)	

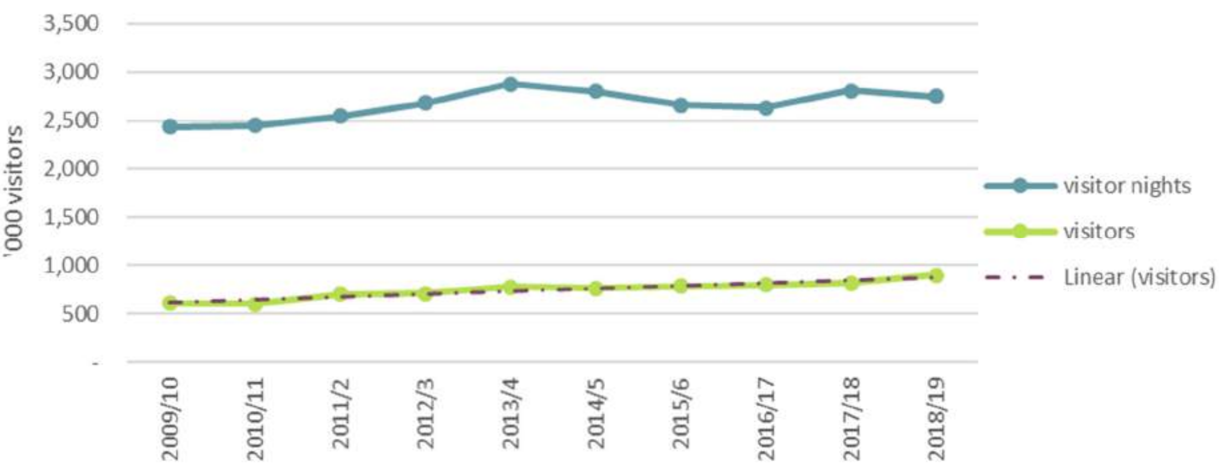
DOMESTIC OVERNIGHT VISITORS

The past financial year has seen a rise in the numbers of domestic overnight visitors of 10% to an estimated 899,000 visitors, making this the largest visitor segment. Visitors spent an estimated 2.74 million nights in the LGA at an average of 3.1 nights. As illustrated below, this segment shows a gradual increase over the past ten years which represents an average growth of 2% per year, and average growth of 3% over the past 5 years.

TABLE 2: DOMESTIC OVERNIGHT VISITORS

Domestic Overnight	2014/15	2015/16	2016/17	**2017/8**	**2018/9**	5 yr average[1]
# of visitors	764	785	793	**818**	**899**	812
% increase on yr	*-2%*	*3%*	1%	**3%**	**10%**	3%
Nights	2,950	2,719	2,630	**2,812**	**2,746**	2,730
Av night	3.9	3.5	3.3	**3.4**	**3.1**	3.4
Sample	*359*	*337*	333	**355**	**353**	
Spend per trip						$445[2]
Spend per night						$135
Lifecycle	Families (31%), Older retired persons (22%)					
Activities*	1. Social activities, 2. Outdoor nature, 3. Active sports					
Source*	59% NSW, 25% ACT and 16% OTHER INTERSTATE. 1. Canberra (25%) 2. Sydney (23%) 3. South Coast (13%)					

FIGURE 1: DOMESTIC OVERNIGHT: VISITORS AND NIGHTS 2013/4 TO 2018/19



Visitor Expenditure (DON)

The average expenditure for domestic overnight visitors reported by TRA in 2018, is $445 per trip. The average per night is $135 for all visitors, which is lower than the $158 per night estimated for Regional NSW[3]. The average for visitors using commercial accommodation is $176 per night[1].

[1] Previous 4 year average 2013/14 to 2018/19.

[2] TRA (2018) LGA report for Eurobodalla – expenditure is based on a 4 year average

[3] DNSW (2018) Travel to Regional NSW

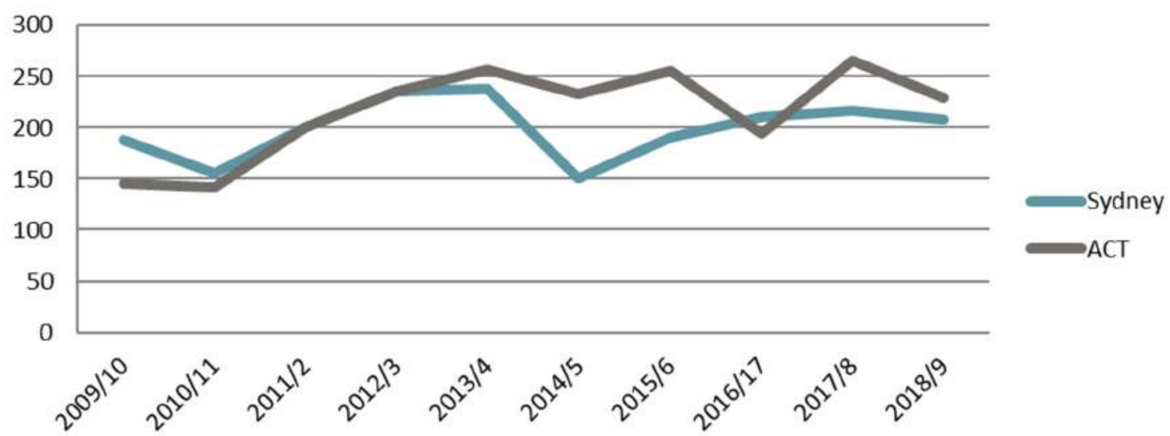
Visitor Residence (DON)

TABLE 3: VISITOR RESIDENCE: 2018/19

		% AUST 2018/19	% AUST 5 Yr average
NSW (59%)	Sydney	23.1%	25.0%
	South Coast	13.1%	12.1%
	Capital Country	7.6%	9.7%
	Central NSW	1.9%	3.0%
	Riverina	5.6%	2.9%
	Blue Mountains	0.7%	1.0%
	North Coast NSW	0.4%	1.2%
	Snowy Mountains	2.1%	1.4%
	Central Coast	0.7%	1.3%
	Hunter	2.1%	1.5%
	The Murray	0.1%	0.4%
	Outback NSW	0.0%	0.3%
	New England	1.7%	0.4%
ACT		25.5%	29.3%
VIC		9.9%	9.8%
QLD		3.7%	1.8%
SA		0.9%	0.7%
WA		0.6%	0.6%
TAS		0.4%	0.5%
NT		0.0%	0.1%

In 2018/19 the vast majority of domestic overnight visitors came from within NSW, with just under half of those come from Sydney (23%). Nearby regions such as the South Coast (13%) and the Capital Country (8%) also provide good visitation. Visitors from Canberra/ACT decreased this year to 25%, however as shown in Figure 3 below, visitation from Canberra remains higher than Sydney while together they make half of the domestic overnight market.

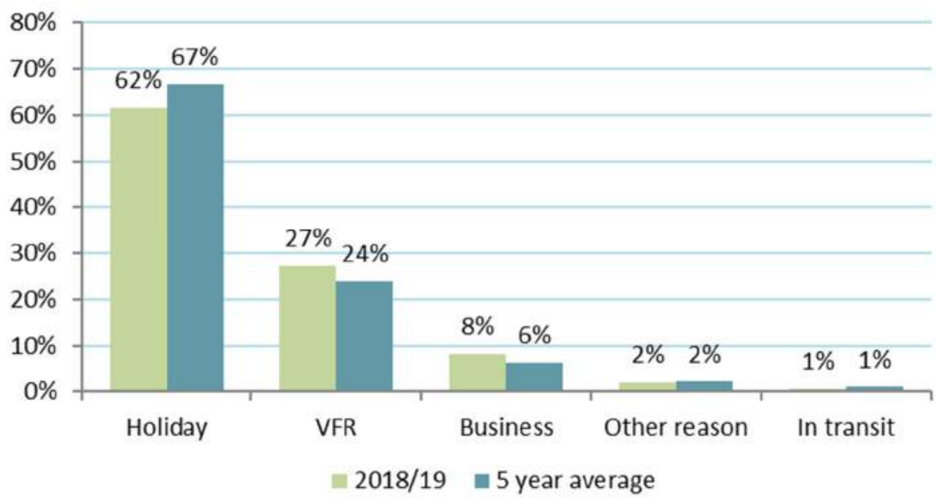
FIGURE 3: DOMESTIC OVERNIGHT VISITORS FROM CANBERRA AND SYDNEY



Reason for Visit (DON)

The main purpose of the visit has remained consistent over the past 5 years, with holiday being the primary reason to visit (62% of visits). Visiting friends or relatives makes up 27% of domestic overnight visits in 2018/19, slightly more than previous years.

TABLE 4: DOMESTIC REASON FOR VISIT



Accommodation (DON)

The importance of the VFR market is also highlighted with VFR being the highest type of accommodation used (32%). Non-commercial accommodation accounts for 54% of visitors and includes weekenders (10%), friends and relatives homes (32%) and other private dwellings such as AirBNB (3%). Commercial accommodation (shaded section in Table 5) accounts for 46% of accommodation used by domestic overnight visitors, including hotels and resorts (17%), commercial caravan parks (18%) and rented houses and apartments (11%).

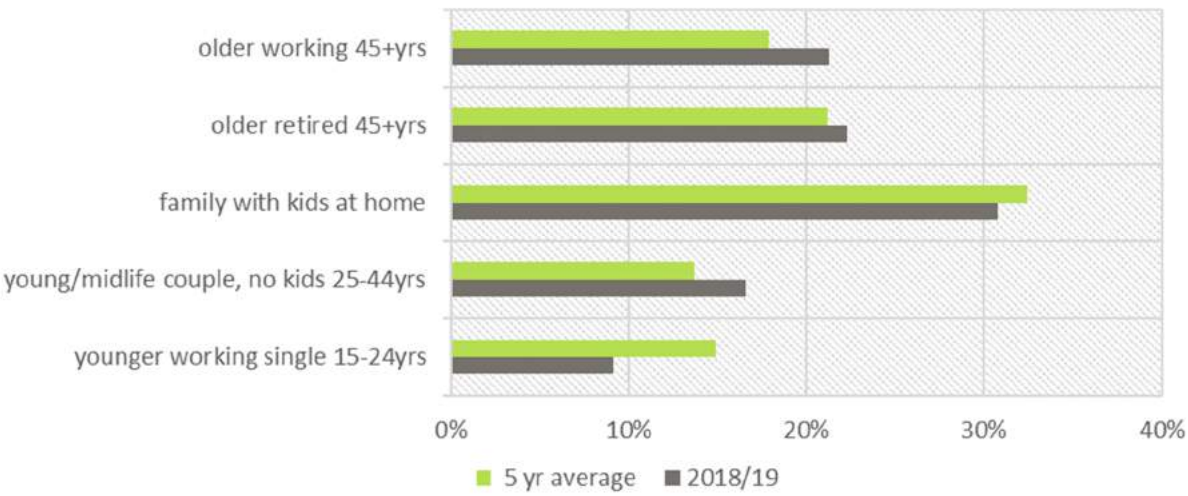
TABLE 5: ACCOMMODATION OF DOMESTIC OVERNIGHT VISITORS

	2014/5	2015/6	2016/17	2017/18	2018/19	% of 2018/19	5 yr av
Guest house or Bed & Breakfast	9	12	1	16	1	0%	1%
Rented house/apt/flat	79	98	90	109	100	11%	12%
Caravan park or commercial camping	175	170	183	157	161	18%	21%
Hotels/resorts	147	144	154	130	148	17%	18%
Non commercial camp	43	32	36	73	85	9%	7%
Own property	51	106	74	69	86	10%	9%
Private accomm (VFR)	266	223	245	243	286	32%	31%
Other private (incl AirBNB)	25	21	8	21	29	3%	3%
Totals	795	806	791	818	895	100%	100%

Lifecycle/travel party (DON)

Analysis of this year's lifecycle segments suggests older segments are becoming stronger for both working (21%) and retired visitors (22%). Families with children at home (1 – 18 years) are not quite as strong as they have been (31%) but still remain the highest segment.

FIGURE 4: DOMESTIC OVERNIGHT: LIFECYCLE (2018/19)



Age (DON)

Previous analysis had shown that visitors over 55 years comprised the largest segment at 40% of all overnight visitors. However, further analysis over the past 5 years shows each 4 year segment is quite even at 10% or less, and each 'group of 20 years' is also even at around 30% (excluding 75+).

TABLE 6: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/19	5 YR AV	5 year av 20 yr group
15-19 yrs	4%	6%	6%	5%	3%	5%	15-34 yrs 29%
20-24 yrs	4%	7%	8%	10%	10%	8%	
25-29 yrs	9%	6%	7%	6%	8%	7%	
30-34 yrs	5%	7%	9%	13%	10%	9%	
35-39 yrs	8%	9%	8%	8%	7%	8%	35 -54 yrs 35%
40-44 yrs	10%	16%	12%	7%	9%	11%	
45-49 yrs	9%	7%	8%	8%	6%	8%	
50-54 yrs	14%	7%	7%	7%	8%	8%	
55-59 yrs	7%	8%	13%	10%	11%	10%	55-74 yrs 34%
60-64 yrs	10%	10%	7%	7%	10%	9%	
65-69 yrs	11%	13%	9%	9%	7%	10%	
70-74 yrs	6%	3%	4%	6%	8%	5%	
75-79 yrs	3%	1%	2%	4%	2%	3%	

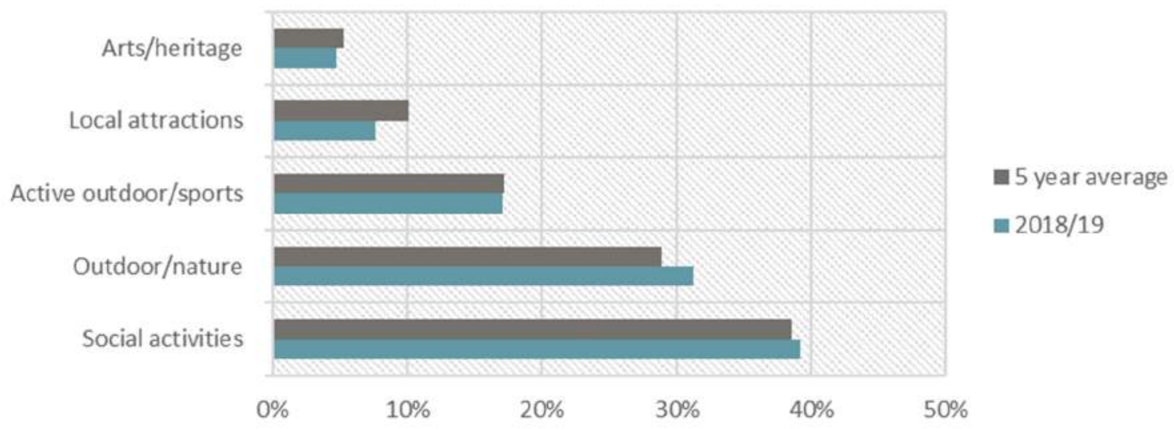
Transport (DON)

The most popular transport option is for self drive 97% with 3% choosing bus/coach/aircraft.

Activities (DON)

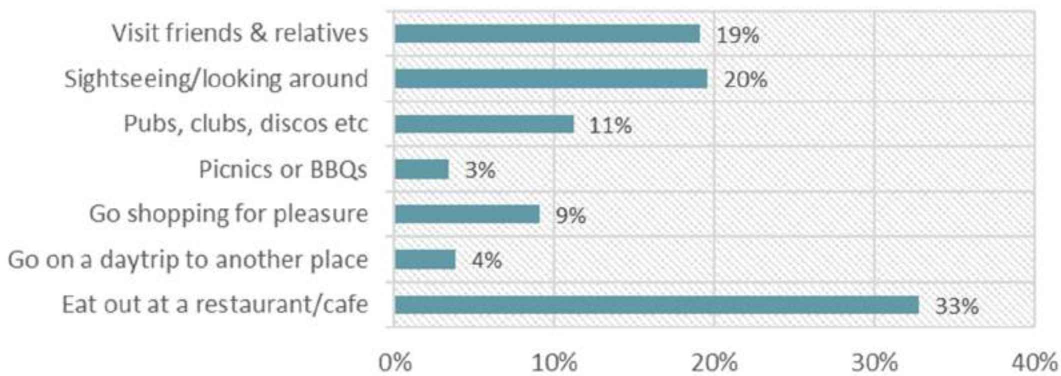
In 2018/19, social activities (39%) and outdoor/nature activities (31%) continued to be the main activities undertaken in Eurobodalla. Survey respondents could choose more than one response, so it is possible that these activities were both undertaken in the same trip.

FIGURE 6: DOMESTIC OVERNIGHT ACTIVITIES



Further analysis of "social activities" below suggests that eating out (33% of social activities) and visiting friends/relatives (19%), sightseeing (20%) and shopping (9%) are the key activities in this segment.

FIGURE 7: OVERNIGHT: SOCIAL ACTIVITIES



Analysis of the **outdoor/nature segment** showed that going to the beach is the main outdoor activity (60% of all outdoor activities) along with bushwalking (18%) and visiting national parks (14%).

DOMESTIC DAY VISITORS

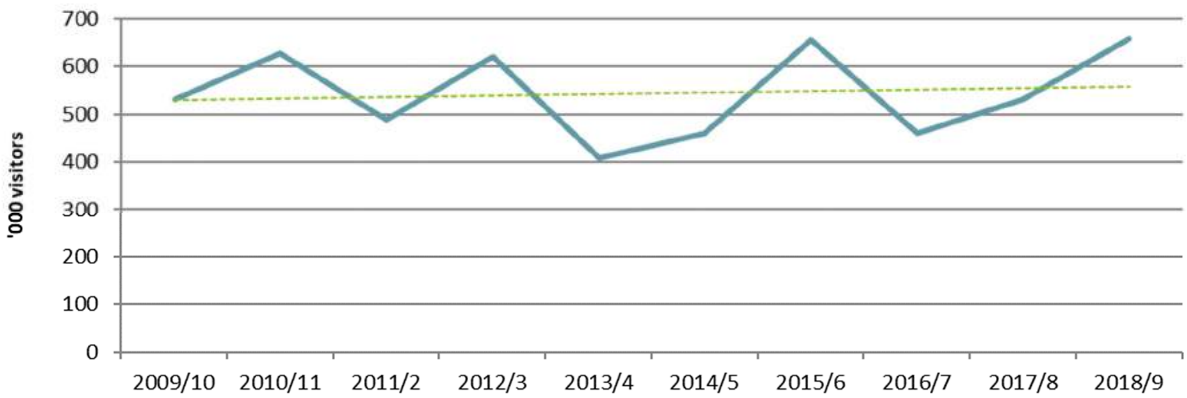
The numbers of domestic day visitors has increased in the past financial year to a record 660,000 visitors. However, it should be noted that day visitation is often quite variable where factors such as weather and other events can deter or encourage day visits, as shown below.

TABLE 7: DOMESTIC DAY VISITORS: SUMMARY

Domestic Day Visitors '000	2014/5	2015/6	2016/17	2017/8	2018/19	5 yr average
# of visitors	461	656	461	532	660	554
% increase/decrease	*13%*	*42%*	-30%	15%	24%	13%
Spend per trip						$102
Sample size	*58*	*73*	56	79	74	68
Lifecycle	Older retired couples 35% Families with children 29%					
Main activities	1. Social 2. Outdoor/nature 3. Active sports					
Source markets	1. South Coast (56%), 2. Canberra (25%) 3. Capital country 8%					

In the 5 years previous to 2018/19 there was an average of 554,000 domestic day visitors per year, however Figure 7 illustrates the volatility of this market over the past ten years. As shown, the last two years demonstrate good growth after the dip in 2016/17. It should be noted that the sample size for this segment is quite limited, which could also account for the annual increases and decreases, which can be expected to be up to 11.5%[4].

FIGURE 7: DOMESTIC DAY VISITORS: 2009/10 – 2018/19



Visitor Expenditure (DDV)

Visitor expenditure data for 2018/19 suggests that day visitors to Eurobodalla LGA spend an average of **$102 per trip**[5] a little lower than the average for regional NSW ($112 per trip 2018)[6].

[4] approx. 11.5% at the 95% confidence level.

[5] TRA (2018) LGA report for Eurobodalla (based on previous 4 year average)

[6] Destination NSW (2018) Travel to Regional NSW Year end June 2018

Visitor Residence (DDV)

TABLE 8: DOMESTIC DAY VISITORS: RESIDENCE

In 2018/19 the vast majority of domestic day visitors came from within the South Coast region comprising 56% of day visitors.

A significant number of day visitors also come from Canberra and other parts of the Capital Country (33% total), and 8% from Sydney.

		2018/19	5 yr av
NSW (75%)	Sydney	8%	7%
	South Coast	56%	59%
	Capital Country	8%	10%
	Other NSW	3%	1%
ACT (25%)		25%	23%
VIC (<1%)		-	-
		100%	100%

Main destination (DDV)

Using the SA2 categories, the main destination for day visitors and overnight visitors is Batemans Bay[7] with 58% of day visitors and 43% of overnight visitors. The second highest visitation is in Narooma[8] which receives 20% of day visitors and 28% of domestic overnight visitors.

TABLE 10: MAIN DESTINATION IN EUROBODALLA

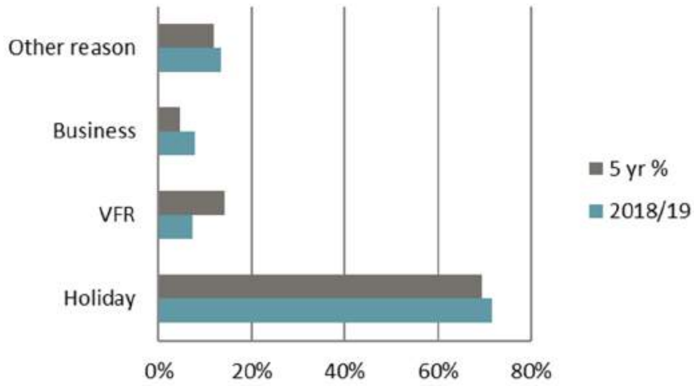
	2014/5	2015/6	2016/7	2017/8	2018/9	5 yr average	2018/19 day trip av %*	2018/19 overnight av %
Batemans Bay	262	447	306	328	385	336	58%	43%
Broulee - Tomakin	18	12	24	12	24	18	4%	8%
Eurobodalla Hint	29	20	15	11	27	20	4%	10%
Moruya - Tuross Head	44	92	75	63	94	72	14%	12%
Narooma	106	128	41	117	129	107	20%	28%
Total	470	706	461	531	660	554	100%	100%

[7] includes Batemans Bay South

[8] SA2 for Narooma includes Bermagui

Reason for Visit (DDV)

Figure 9: Domestic Day Visitors: Reason



In 2018/19, there were more day visitors **on holiday (72%)** and on business (8%) or in the area for "other reasons" (13%) - including medical reasons (6%).

As shown in Figure 9 there were less visiting friends or relatives (7%) than the 5 year average would suggest.

Transport (DDV)

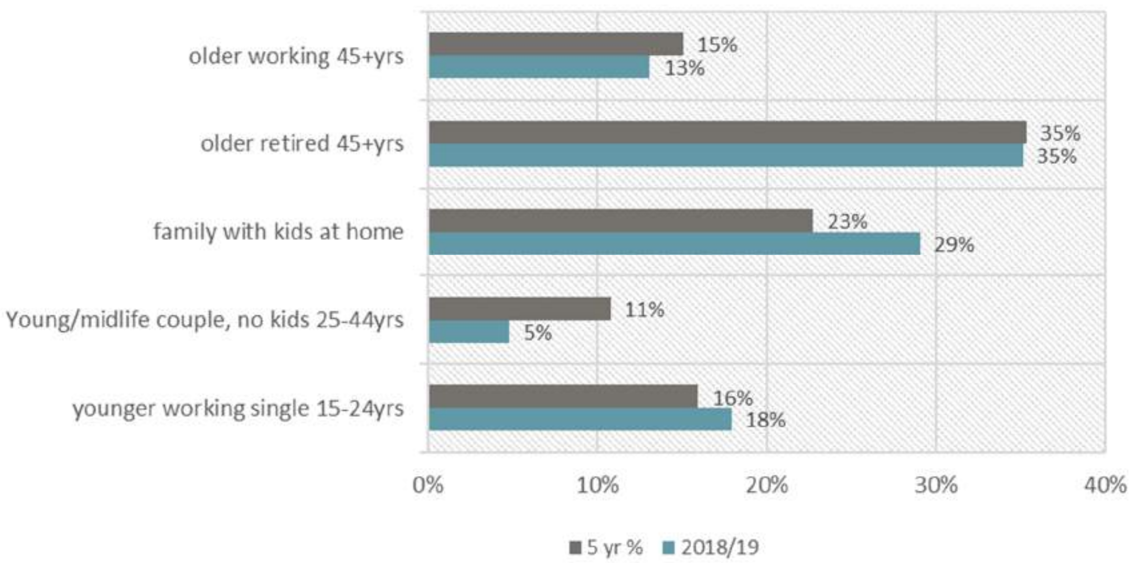
The most popular transport option is for self-drive (99%) with 1% choosing the bus/coach.

Lifecycle (DDV)

There are two clear groups which remain as prominent lifecycle segments for day visitors for 2018/9:

- Older retired people (single or married aged 45+ yrs) are the largest group (35%).
- Families with children of any age are the second main group at an average of **29%** of all day visitors, increased from 23% over the past 5 years.

Figure 10: Domestic Day Visitors: Lifecycle 2018/19



Age and marital status (DDV)

As suggested in the lifestyle groups above, there remains a larger proportion of visitor age groups 55+ (48%) and a substantial increase in those 35-39 years (19%) which corresponds with the increase in families with children at home.

Age (DDV)

Previous analysis in 2017/18 had shown that day visitors over 55 years comprised the largest segment at 61% of all day visitors. However, further analysis over the previous five years shows 55+ to be 48%.

It was also noted from the extended analysis that most 4 year segments are quite even at 10% or less, yet there was a greater presence of 35-39 years (19%) this year.

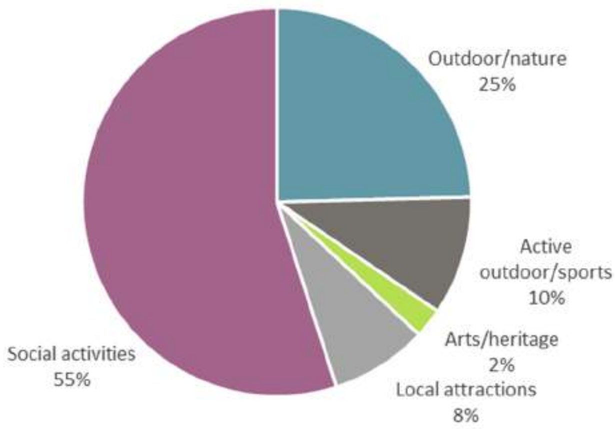
TABLE 11: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

<table>
<tr><th></th><th>2014/5</th><th>2015/6</th><th>2016/7</th><th>2017/8</th><th>2018/19</th><th>5 YR AV</th><th>5 year av 20 yr group</th></tr>
<tr><td>15-19 yrs</td><td>6%</td><td>11%</td><td>6%</td><td>5%</td><td>3%</td><td>6%</td><td rowspan="4">15-34 yrs 21%</td></tr>
<tr><td>20-24 yrs</td><td>3%</td><td>2%</td><td>8%</td><td>3%</td><td>3%</td><td>4%</td></tr>
<tr><td>25-29 yrs</td><td>12%</td><td>11%</td><td>10%</td><td>3%</td><td>4%</td><td>8%</td></tr>
<tr><td>30-34 yrs</td><td>2%</td><td>7%</td><td>0%</td><td>2%</td><td>5%</td><td>3%</td></tr>
<tr><td>35-39 yrs</td><td>7%</td><td>1%</td><td>1%</td><td>4%</td><td>19%</td><td>6%</td><td rowspan="4">35 -54 yrs 30%</td></tr>
<tr><td>40-44 yrs</td><td>7%</td><td>13%</td><td>13%</td><td>11%</td><td>7%</td><td>10%</td></tr>
<tr><td>45-49 yrs</td><td>6%</td><td>5%</td><td>2%</td><td>8%</td><td>5%</td><td>5%</td></tr>
<tr><td>50-54 yrs</td><td>12%</td><td>12%</td><td>8%</td><td>4%</td><td>11%</td><td>9%</td></tr>
<tr><td>55-59 yrs</td><td>9%</td><td>12%</td><td>14%</td><td>13%</td><td>7%</td><td>11%</td><td rowspan="4">55-74 yrs 41%</td></tr>
<tr><td>60-64 yrs</td><td>15%</td><td>8%</td><td>9%</td><td>9%</td><td>11%</td><td>11%</td></tr>
<tr><td>65-69 yrs</td><td>10%</td><td>11%</td><td>11%</td><td>21%</td><td>13%</td><td>13%</td></tr>
<tr><td>70-74 yrs</td><td>4%</td><td>3%</td><td>10%</td><td>8%</td><td>7%</td><td>6%</td></tr>
<tr><td>75-79 yrs</td><td>2%</td><td>2%</td><td>6%</td><td>4%</td><td>4%</td><td>4%</td><td rowspan="2">75+ yrs 7%</td></tr>
<tr><td>80+yrs</td><td>4%</td><td>2%</td><td>2%</td><td>6%</td><td>0%</td><td>3%</td></tr>
</table>

The ratio of those who are part of a couple (60%) is higher than those who are single (40%). Females are slightly more prevalent (53%) than females (47%).

Activities (DDV)

FIGURE 11: DOMESTIC DAY VISITORS: ACTIVITIES



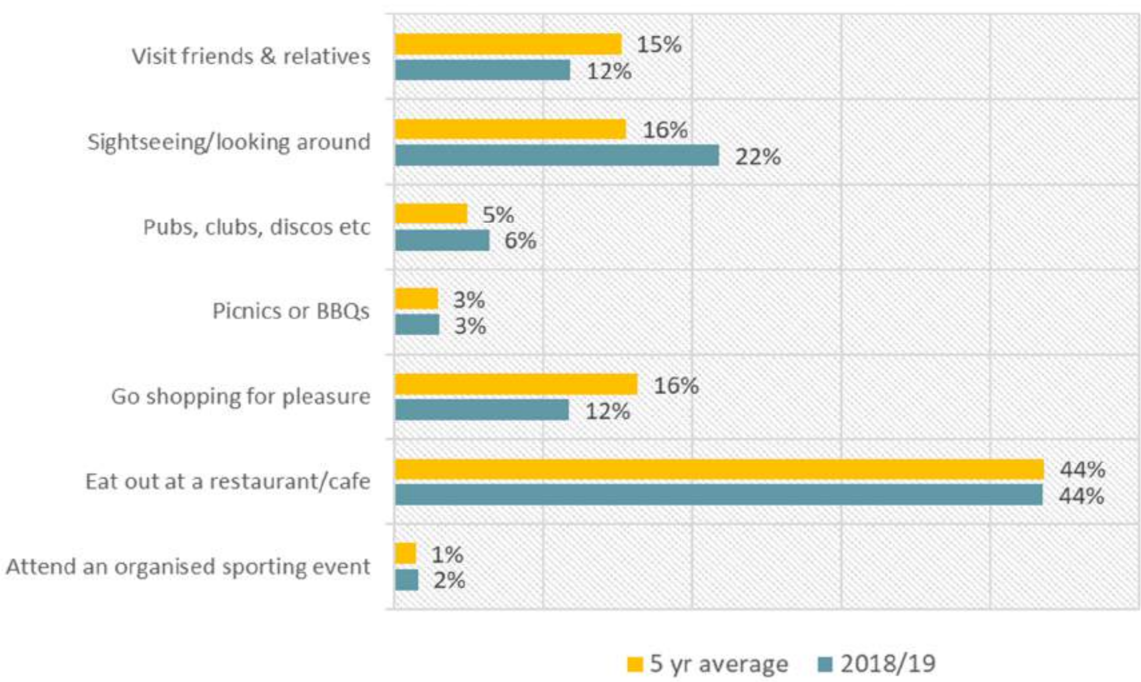
In 2018/19, social activities clearly dominated the activities of day visitors, with over half of activities (55%) involving social activities illustrated below such as dining, shopping or visiting friends and relatives.

Around a quarter of day visitors also undertook outdoor and nature activities which mainly included going to the beach (64% of outdoor activities).

Respondents can choose more than one activity so it is possible that more than one activity is undertaken in the same trip.

Further analysis shows the breakdown of social activities shows a high proportion of visitors eating out (44% of social visitors) as well as sightseeing (22%).These patterns remain similar to the previous 5 years, with a rise in general sightseeing.

FIGURE 12: DOMESTIC DAY VISITORS: SOCIAL ACTIVITIES 2018/19



INTERNATIONAL VISITORS

The number of international travellers has increased in the past five years to approximately 40,000.

TABLE 11: INTERNATIONAL VISITORS: SUMMARY

INTERNATIONAL '000	2014/15	2015/16	2016/17	2017/18	2018/19	5 yr average
# of visitors	25	29	37	38	40	24
% change on year	-3%	17%	25%	3%	5%	13%
Nights	144	91	191	151	122	140
Av night stay	5.8	3.1	5.2	4.0	3.1	4.5
Sample size	*173*	*184*	*190*	*183*	*197*	
Spend per trip	^	^	^			$368
Spend per night						$88
Activities	1. Social, 2. Outdoor/nature, 3. Local attractions					
Source	All Europe incl UK (55%) Nth America (22%) All Asia (13%) UK (15%) Germany (12%) USA(14%)					

Visitor Residence (INT)

The Eurobodalla continues to attract a very consistent mix of international markets, with the main generating countries being the UK (15% of visitors), USA (14%) and Germany (12%). Table 12 shows the wide variety of geographical markets which comprise the total international market.

TABLE 12: INTERNATIONAL MARKETS

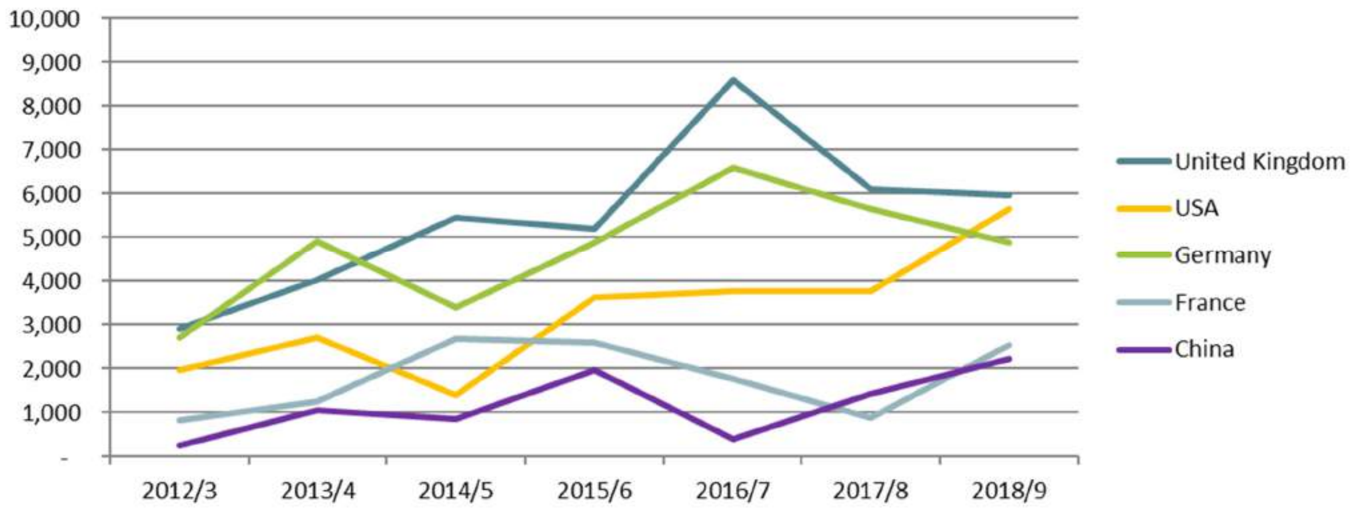
	2014/5	2015/6	2016/7	2017/8	2018/19	AVERAGE
UK	22%	18%	23%	17%	15%	19%
USA	6%	12%	10%	10%	14%	11%
Germany*	14%	17%	18%	15%	12%	15%
Other Europe*	5%	5%	4%	8%	11%	7%
Canada	8%	7%	6%	7%	8%	7%
New Zealand	4%	5%	7%	4%	7%	6%
China	3%	7%	1%	4%	6%	4%
France*	11%	9%	5%	2%	6%	6%
Scandinavia*	3%	5%	4%	2%	4%	4%
Switzerland*	5%	2%	2%	2%	4%	1%
Netherlands*	4%	3%	4%	0%	4%	4%
Other	5%	3%	2%	4%	3%	3%
Malaysia	0%	0%	4%	0%	2%	2%
Other Asia	0%	1%	2%	6%	1%	1%
Italy*	1%	0%	2%	1%	1%	1%
Japan	0%	0%	1%	1%	1%	0%
Korea	0%	1%	1%	0%	1%	1%

When grouped further into international regions;

- countries in **Europe & UK** (marked with *) are the highest generating region (55%)
- countries in **North America** combine to 22%
- countries in **Asia** equal 13%
- New Zealand 7%
- all other countries - including South America, UAE and Pacific (3%).

Over the past 5 years many key international markets continue to grow and provide the bulk of international visitation. In particular, the USA shows positive gains, with some decreases in the UK and Germany. Other Asian markets have increased slightly, including China, however they remain as smaller segments.

FIGURE 13: KEY INTERNATIONAL MARKETS



Visitor Expenditure (INT)

International visitors to Eurobodalla spent an average $88 per night[9] which is slightly higher than Regional NSW at $68 per night.[10] The average expenditure per trip was $368 in 2018.

[9] TRA (2018) LGA profile Port Macquarie
[10] DNSW (2018) Travel to Regional NSW YE Dec 2018

Transport (INT)

The most popular transport option for international markets is self drive (90%), with 6% choosing the bus/coach and 4% aircraft.

Age (INT)

Previous analysis had shown that visitors over 55 years comprised the largest segment at 39% of all international visitors. Further analysis shows each 4 year segment is quite even at around 10% or less, and each 'group of 20 years' is also even at around 30%. The highest age segment could be considered as 'young travellers' 20-30yrs (26%).

TABLE 13: AGE GROUPS OF INTERNATIONAL VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/19	5 YR AV	20 yr group
15-19 yrs	4%	3%	3%	3%	2%	3%	15-34 yrs 35%
20-24 yrs	10%	12%	15%	12%	11%	12%	
25-29 yrs	14%	18%	12%	14%	15%	14%	
30-34 yrs	12%	6%	5%	7%	4%	6%	
35-39 yrs	4%	9%	4%	7%	10%	7%	35 -54 yrs 26%
40-44 yrs	7%	4%	5%	4%	6%	5%	
45-49 yrs	4%	6%	11%	9%	3%	7%	
50-54 yrs	7%	7%	6%	6%	10%	7%	
55-59 yrs	12%	10%	12%	10%	7%	10%	55-70+yrs 39%
60-64 yrs	10%	9%	11%	17%	12%	12%	
65-69 yrs	11%	10%	13%	9%	11%	10%	
70 + yrs	5%	8%	6%	5%	10%	7%	

Lifecycle and parents

The lifecycle group of international visitors is changing to be similar to the domestic traveller. Over the previous 5 years (2014-19), families with a parent of children under 15 yrs have increased from a low of 2%, to 19% of international visitors, more in line with 29% day and 31% domestic overnight visitors.

TABLE 14: PARENTS OF CHILDREN UNDER 15

PARENTS OF CHILDREN	2014/5	2015/6	2016/7	2017/8	2018/9	5 YR AVERAGE
International	2%	11%	16%	17%	19%	13%
Domestic Day	13%	19%	23%	23%	29%	21%
Domestic Overnight	40%	33%	30%	31%	31%	34%

^ data not collected by TRA in that year

Travel Party (INT)

Both singles (32%) and couples (38%) are the major international travel groups in 2018/9, with families (16%) making an increase of the total. Other features of the travel parties in 2018/19;

- males comprise 48% and females **52%**
- 23% of international visitors are **backpackers**
- a decreasing number are on package tours 5% (down from 11% in 2011/2)
- most are independent travellers (99% are **not** on a group tour).

TABLE 15: TRAVEL PARTY FOR INTERNATIONAL VISITORS

	2014/5	2015/6	**2016/7**	**2017/8**	**2018/9**	5 yr average
Single traveller	42%	42%	40%	42%	32%	39%
Adult couple	46%	40%	35%	34%	38%	38%
Family group	3%	10%	11%	8%	16%	10%
Friends/relatives together	8%	9%	13%	16%	14%	12%

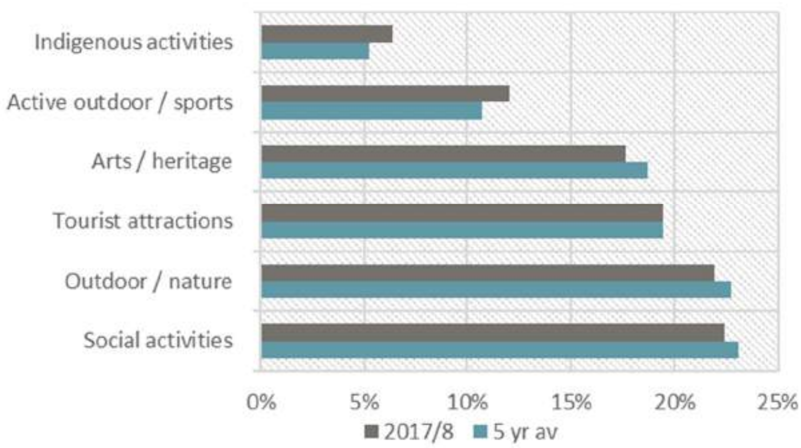
Reason for Visit (INT)

Data collected by TRA for the last 2 years for international reason to visit has known issues and is not consistent with past trends[11]. It is therefore not reported this year for this year. Before this issue arose (2014/5 to 2016/7) there had been a clear pattern that most overnight international visitors are **on a holiday (85%)**, while others are visiting friends or relatives (12%), and a smaller ratio are here on business (2%) or other reasons including education (1%) or being in transit (1%).

Activities (INT)

Activities on the trip in 2018/9 are consistent with previous years, with social activities (22%) and outdoor/nature (21%) being the two major activities undertaken by International visitors along with local tourists attractions (19%).

FIGURE 14: INTERNATIONAL ACTIVITIES



[11] https://www.tra.gov.au/International/International-Visitor-Survey-Methodology/ivs-methodology

Place of arrival (INT)

In 2018/19 most international visitors arrived at Sydney airport (58%) with the other 42% arriving in a variety of places in Australia, including Melbourne (22%) and in Canberra (0.3%).

TABLE 16: PLACE OF ARRIVAL FOR INTERNATIONAL VISITORS

	2014/5	2015/6	2016/7	2017/9	2018/9	% current	5 yr average	% of average
Sydney	14.4	17.0	18.9	19.8	23.9	58%	18.7	56.7%
Melbourne	6.3	8.5	10.5	10.4	9.8	24%	8.9	26.9%
Brisbane	1.8	1.6	2.3	2.6	2.7	7%	2.1	6.6%
Perth	1.1	0.8	2.8	0.5	0.7	2%	1.1	3.5%
Adelaide	1.2	0.1	1.2	1.8	2.6	7%	1.3	4.2%
Darwin	-	0.5	0.2	0.9	0.0	0%	0.3	0.9%
Cairns	0.2	0.8	0.1	0.1	0.0	1%	0.8	1.0%
Canberra	-	-	0.0	0.2	0.3	1%	0.3	0.3%
Total	25.0	29.4	36.6	36.6	40.4	100%	30.7	100%

Accommodation (INT)

Commercial accommodation (shaded section in Table 17) accounted for 65% of accommodation in 2018/9, including hotels and resorts (27%) and commercial caravan parks (27%).

Non-commercial accommodation accounted for 35% and includes friends and relatives homes (17%), non-commercial camping (9%) and other private (9%).

TABLE 17: ACCOMMODATION FOR INTERNATIONAL TRAVELLERS

	2014/5	2015/6	2016/7	2017/8	2018/9	% of 2018/19	5 yr average
Guest house or Bed & Breakfast	1,368	955	768	2,219	1,079	3%	4%
Rented house/apt/flat	691	1,329	1,166	733	2,015	5%	3%
Caravan park or commercial camping ground	5,469	6,973	12,425	10,035	10,738	27%	26%
Backpacker or hostel	1,820	1,831	1,936	1,204	1,157	3%	5%
Hotels/resorts	7,392	9,655	10,300	9,199	10,699	27%	27%
Non commercial camping	2,827	3,172	3,198	3,453	3,353	9%	9%
Private accomm (VFR)	8,737	9,955	6,912	6,797	6,740	17%	19%
Other private	722	1,405	2,434	2,801	3,541	9%	6%

2018/19 Comparisons to other regions

Comparisons have been made to the following local government areas which are of similar size and in regional coastal locations.

Table 18: Comparison regions

		2017/8 visitors	2018/19 visitors	2018/19 nights	*% increase on previous year visitors*
Eurobodalla 13% of South Coast	Domestic day	532	660	^	24%
	Domestic overnight	818	900	*2746*	10%
	International	38	40	*122*	5%
	Total	***1388***	***1600***	*2868*	15%
Shoalhaven 30% of South Coast	Domestic day	1763	1751	^	-1%
	Domestic overnight	1544	1754	*5679*	14%
	International	64	58	*358*	-9%
	Total	***3371***	***3563***	***6037***	6%
Bega 10% of South Coast	Domestic day	450	508	^	13%
	Domestic overnight	612	674	*2722*	10%
	International	40	47	*237*	18%
	Total	***1102***	***1229***	***2959***	12%
South Coast	Domestic day	6790	7418	^	9%
	Domestic overnight	3849	4450	*13903*	16%
	International	184	192	*2597*	4%
	Total	***10823***	***12060***	***16500***	11%
Port Stephens	Domestic day	820	***917***	^	12%
	Domestic overnight	703	810	*2512*	15%
	International	48	43	*180*	-10%
	Total	***1571***	1770	***2692***	13%

^ not applicable