

Eurobodalla Tourism Monitor  
Quarter Snapshot: July to Sep 2018



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## Introduction

The purpose of this report is to provide analysis of visitor data provided by Tourism Research Australia (TRA). The service provided by Destination Research involves analysing the TRA data that is relevant to the Port Stephens destination, and organising it into simplified reports. Data was downloaded from the TRA National Visitor Survey and the International Visitor Survey on-line database before being analysed and organised into quarterly tables. Where possible, this was cross-checked with published statistics, and data compiled by DPS<sup>1</sup>. The research utilises:

- TRA subscription data for domestic and international visitors.
- Quarterly data which is provided by TRA 10 weeks after the end of the quarter.
- The Eurobodalla statistical areas (ST2) comprised of the following sub-areas:
  - 101041017 - Batemans Bay
  - 101041018 - Batemans Bay - South
  - 101041021 - Broulee - Tomakin
  - 101041022 - Deua - Wadbilliga
  - 101041024 - Eurobodalla Hinterland
  - 101041024 - Moruya - Tuross Head
  - 101041027 - Narooma (this SA2 also includes Bermagui).
- DNSW and TRA Visitor expenditure data that is summarised for regions
- Expenditure data is not available for individual local government areas (LGA), or statistical areas (ST2).
- International visitors only include *overnight* visitors. There is currently no data available on international day visitors to regional areas.

Further information on the methodology used by TRA can be sourced at

<http://www.tra.gov.au/aboutus/international-visitor-survey-methodology.html>. In

particular it should be noted that in 2014 TRA has adopted a modified methodology to collect data from domestic visitors which includes accessing Australian residents using mobile phones as well as home phones. This may impact time-series results which compare visitation over time.

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<sup>1</sup> <http://www.economicprofile.com.au/eurobodalla/tourism/visitor-expenditure>

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### *Disclaimer and Copyright*

The report has been compiled by researchers from Destination Research. The visitation statistics contained in this report are based on the sample data collected by Tourism Research Australia (TRA) 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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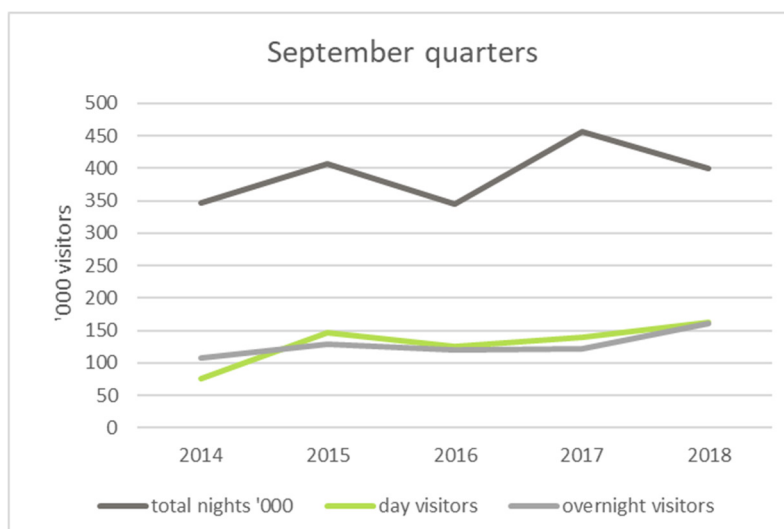


## Single Quarter: July - September

- The September (Jul to Sept) quarter in 2018 showed a substantial increase in *domestic overnight* visitors (32%) from the same quarter in the previous years. However the number of visitor nights decreased by 13% as visitors stayed for less nights (av. 2.4 nights), slightly less than the five year average.
- The numbers of *domestic day* visitors also increased 17% from the previous year.
- The numbers of *international* visitors increased from the same quarter in the previous year (+40%) as did the number of nights stayed.

'000 visitors	Sept quarter 2014	Sept quarter 2015	Sept quarter 2016	Sept quarter 2017	Sept quarter 2018	Five year average
<b>Domestic overnight visitors</b>	107	129	120	121	160	127
<b>% increase</b>		21%	-7%	1%	32%	12%
<b>nights</b>	336	392	329	443	384	377
<b>% increase</b>		17%	-16%	35%	-13%	5%
<b>av night stay</b>	<b>3.1</b>	<b>3.0</b>	<b>2.7</b>	<b>3.6</b>	<b>2.4</b>	3.0
<b>Domestic day visitors</b>	75	146	125	140	163	130
<b>% increase</b>		95%	-15%	12%	17%	27%
<b>International</b>	2	4	4	5	7	4.4
<b>% increase</b>		100%	0%	25%	40%	41%
<b>International nights</b>	11	15	15	14	15	14
<b>av night stay</b>	5.5	3.8	3.8	2.8	2.1	3.6
<b>total visitors '000</b>	<b>184</b>	<b>279</b>	<b>249</b>	<b>266</b>	<b>330</b>	262
<b>% increase</b>		52%	-11%	7%	24%	18%
<b>total nights '000</b>	<b>347</b>	<b>407</b>	<b>344</b>	<b>457</b>	<b>399</b>	391

\*all figures rounded to the nearest thousand



## Comparative regions

Comparisons have been made to two other competitor destinations - which are local government areas of similar size and are within driving distance from Sydney. Both areas also have small regional airports, similar destination attributes such as river access, ports, national parks and beaches.

It is also useful to look at the total region (including Eurobodalla) to assess the market share of the wider tourism region which remains at around 20% for overnight and international visitors, and 10% for day visitors.

JULY TO SEPT 2018		Visitors	Nights	Av stay	% share
		'000	'000	Nights	
Port Stephens	Domestic day	162	^	^	
	Domestic overnight	136	393	2.9	
	International	11	46	4.2	
	<b>Total</b>	<b>309</b>	<b>439</b>		
Port Macquarie	Domestic day	157	^	^	
	Domestic overnight	163	613	3.8	
	International	15	55	3.7	
	<b>Total</b>	<b>335</b>	<b>668</b>		
Eurobodalla	Domestic day	163	^	^	
	Domestic overnight	160	384	2.4	
	International	7	15	2.1	
	<b>Total</b>	<b>330</b>	<b>399</b>		
Sapphire Coast	Domestic day	109	^	^	
	Domestic overnight	73	226	3.0	
	International	4	17	4.2	
	<b>Total</b>				
Shoalhaven	Domestic day	424	^	^	
	Domestic overnight	296	925	3.1	
	International	6	35	5.8	
	<b>Total</b>	<b>726</b>	<b>960</b>		
South Coast region	Domestic day	1,628	^	^	10%
	Domestic overnight	792	2,121	2.7	20%
	International	35	707	20.2	20%
	<b>Total</b>	<b>2,455</b>	<b>2,828</b>		



## Rolling year analysis

- The rolling year total is 8% higher than last year for overnight visitors and 17% for day visitors.
- The rolling year total for international visitors is also up by 3%.
- Jul – September comprises approx. 18% of yearly visitation, with Jan – March comprising 37%.

Quarter	OCT-DEC 2017	JAN-MAR 2018	APR-JUNE 2018	JULY-SEP 2018	rolling year total 2018	Previous rolling year 2017
<b>Domestic overnight visitors</b>	196	319	181	160	<b>856</b>	795
<b>% increase</b>		63%	-43%	-12%	<b>8%</b>	
Nights	502	1258	609	384	<b>2753</b>	2745
<b>% increase</b>		151%	-52%	-37%	<b>0%</b>	
<b>Av night stay</b>	2.6	3.9	3.4	2.4	<b>3.2</b>	3.5
<b>Domestic day visitors</b>	102	153	137	163	<b>555</b>	476
<b>% increase</b>		50%	-10%	19%	<b>17%</b>	
<b>International visitors</b>	10	13	8	7	<b>38</b>	37
<b>% increase</b>		30%	-38%	-13%	<b>3%</b>	
<b>International nights</b>	78	42	16	15	<b>151</b>	132
<b>% increase</b>		-46%	-62%	-6%	<b>14%</b>	
<b>Av night stay</b>	7.8	3.2	2.0	2.1	<b>4.0</b>	3.6
Total visitors	308	485	326	330	<b>1449</b>	1308
Total nights '000	580	1300	625	399	<b>2904</b>	2877

## Expenditure for Eurobodalla

The most current expenditure statistics are published by TRA as a four year average for the year ending December 2016<sup>2</sup>:

	Av. spend per person per trip in Eurobodalla	Average spend per night
Domestic overnight visitors	\$421	\$118
Domestic daytrip visitors	\$111	\$111
International overnight visitors	\$368	\$71

**The total yearly expenditure of these three markets is approximately \$350 million in direct visitor expenditure for the year ending December 2016.**

<sup>2</sup> TRA (2016) LGA Profile for Eurobodalla. Dec 2012 to 2016.