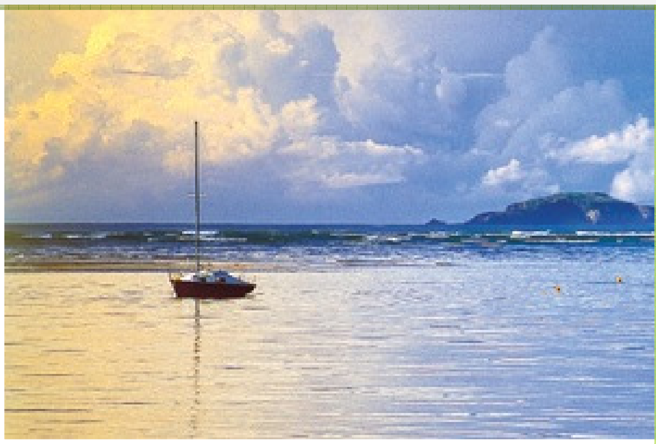
2017

Eurobodalla Tourism Monitor



DESTINATION
RESEARCH
know your potential

Jo Mackellar PhD.

30 Dec 2017

Disclaimer and Copyright

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statistics contained this report are based on the sample data collected by Tourism Research Australia (TRA 2015 unpublished data) and therefore provide an indication of visitor trends rather than actual performance measures.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.

Enquiries should be directed to the Research Manager, destination.research@yahoo.com

Table of Contents

Table of Tables and Figures

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 - see list in Appendix 1
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 not** provided regularly by the TRA and is only provided in a summarised form for regions (i.e. for the South Coast region, but not for Eurobodalla).TRA may provide a one-off analysis for an LGA as shown in this report.

VI. In January 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. In late 2015, TRA implemented an improved phone number data set that better represented the mobile-user population. However, this caused unexpected growth rates for some smaller population areas and for business travel. TRA has revised the estimates for 2014 and 2015 data to ensure the continuation of the time series, and the revised estimates are in the release of year ending March 2017 data. The revised data HAS BEEN included in this report.

EUROBODALLA VISITOR PROFILE (2016/7)

The following is a brief profile of visitors to Eurobodalla for the financial year 2016/7. Further analysis of the key markets are found in the sections following.

- *Domestic overnight* markets provided an estimated **793,200** visitors for 2.6 million nights.
- *Domestic day trips* provided an estimated **461,000** visitors per year.
- *International markets* provided an estimated **36,600** visitors per year for 191,000 nights.
- The three markets totalled **1.3 million** visitors to Eurobodalla.

Domestic overnight visitors

- Key markets Canberra (24%), Sydney (25%), the South Coast (10%).
- Lifecycle segments include families (30%) and older retired persons (18%).
- Key activities include social activities (39%) and outdoor nature activities (28%).

Domestic day visitors

- Key markets are South Coast (60%), Canberra (11%), Capital Country (17%)
- Lifecycle segments include older retired couples (34%) and families (23%).
- Key activities include social activities (52%) and outdoor/nature activities (23%).

International visitors

- International visitors are mainly from UK (23%), Germany (18%) and USA (10%).
- Key activities include social activities (22%) and outdoor/nature activities (21%).
- Backpackers make up 24% of the international market.
- Package tours 6%.

TABLE 1: VISITOR SUMMARY: 2016/7

Five Year Average	Domestic overnight	International	Domestic day trip	Total
Visitors ('000)	793,200	36,630	461,040	**1,290,870**
Nights ('000)	2,630,000	191,100	^	**2,821,100**
Av night stay	3.3	5.2	^	
Lifecycle	Families with children (30%) Older retired persons (18%)	Older people 55+ (39%) Young people, 20-30yrs (27%)	Families with children (23%) Older retired couples (34%)	
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	
Source markets	Canberra (24%) Sydney (25%) South Coast (10%)	UK/Europe (61%) Nth America (16%) Asia(12%)	South Coast (60%) Canberra (11%) Capital Country (17%)	

FINANCIAL YEAR-END: YEAR TO YEAR COMPARISON

When compared to the previous financial year, the results show:

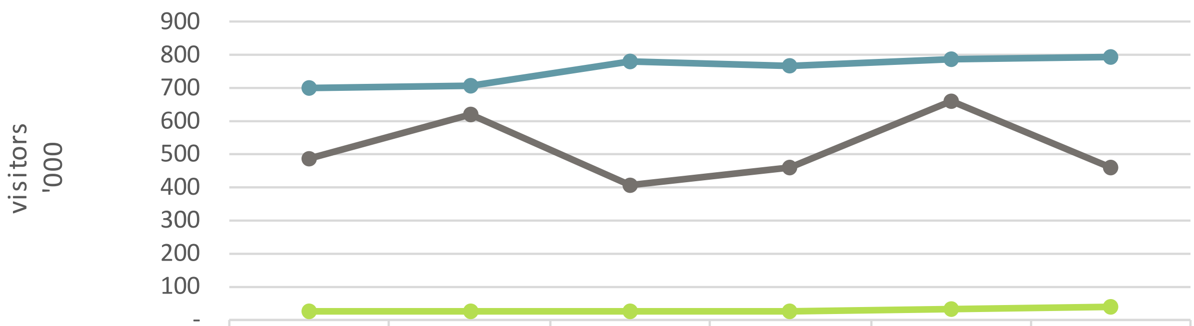
- An overall decrease in all visitors of 12% on the previous year, however they are in line with the previous 5 year average (2011/2 to 2015/6) of **1.3 million visitors**.
- An increase from the previous year in domestic overnight visitors (1%), domestic nights (0.5%) and a decrease in domestic day visitors (-30%).
- International visitors have increased substantially from last year (28%).

TABLE 2: FINANCIAL YEAR COMPARISON

Year end June '000	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	5 year av
Domestic overnight visitors	702	705	778	764	785	793	747
% change		0.4%	10.4%	-1.8%	2.7%	1.0%	2.9%
Domestic nights	2,547	2,684	2,875	2,950	2,719	2,630	2,755
% change		5%	7%	3%	-8%	-3%	1.8%
av night stay	3.6	3.8	3.7	3.9	3.5	3.3	3.69
Domestic day visitors	488	620	407	460	656	461	526
% change		27%	-34%	13%	43%	-30%	12.1%
International	24	21	26	25	29	37	25
% change		-12%	23%	-3%	17%	25%	6.2%
Int nights	105	123	101	144	91.0	191	113
av night stay	4.4	5.9	3.9	5.8	3.1	5.2	4.60
2016/7 Total Visitors	1,214	1,346	1,211	1,249	1,470	1,291	1,298
2016/7 Total Nights*	2,652	2,807	2,976	3,094	2,810	2,821	2,867

* includes international nights

FIGURE 1: ALL VISITOR COMPARISON 2011/2 TO 2016/7



	2011/12	2012/13	2013/14	2014/15	2015/16	2016/7
dom onite	702	705	778	764	785	793
dom day	488	620	407	460	656	461
int	24	21	26	25	29	37

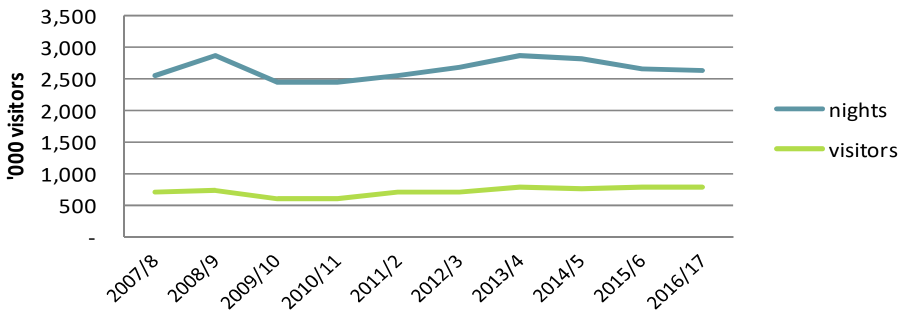
DOMESTIC OVERNIGHT VISITORS

The past financial year has seen a rise in the numbers of domestic overnight visitors of 1% to 793,000 visitors, making this the largest visitor segment. Visitors spent an estimated 2.6 million nights in the LGA at an average of 3.3 nights.

TABLE 3: DOMESTIC OVERNIGHT VISITORS

Domestic Overnight	2011/12	2012/13	2013/14	2014/15	2015/16	**2016/17**	5 yr average [1]
# of visitors	702	705	778	764	785	**793**	747
% increase on yr		*0.4%*	*10.4%*	*-1.9%*	*2.8%*	**1.0%**	
Nights	2,547	2,684	2,875	2,950	2,719	**2,630**	2,755
Av night	3.6	3.8	3.7	3.9	3.5	**3.3**	3.7
Sample	*292*	*295*	*335*	*359*	*337*	**333**	332
Spend per trip							$421[2]
Spend per night							$160
Lifecycle	Families (30%), Older retired persons (21%)						
Activities*	1. Social activities, 2. Outdoor nature, 3. Active sports						
Source*	59% NSW, 24% ACT and 17% OTHER INTERSTATE. 1. Canberra (24%) 2. Sydney (26%) 3. Capital Country (12%)						

FIGURE 2: DOMESTIC OVERNIGHT: VISITORS AND NIGHTS 2007/8 TO 2016/7



As shown in the chart above there has been consistent gradual growth of visitor numbers for the past 10 years of around 1% per year (12% increase since 2007/8) while the number of nights stayed has increased by 3% (average -1% per year) over that time.

Visitor Expenditure (DON)

Visitor expenditure for individual LGAs is produced every two years by TRA, showing the average for domestic overnight travellers to Eurobodalla LGA is $421 per trip[2] ($118 per night excluding accommodation and $160 including accommodation). These figures are the same as the average for the South Coast sub-region[3] of $118 per night .

[1] Previous 5 year average 2011/12 to 2015/16.

[2] TRA (2016) LGA report for Eurobodalla

[3] http://www.destinationnsw.com.au -South-Coast-sub-region-YE-Mar-16.pdf

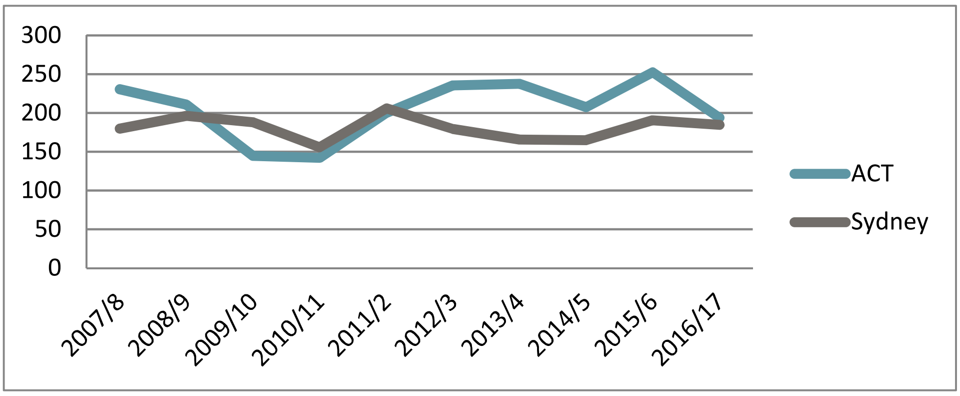
Visitor Residence (DON)

TABLE 4: VISITOR RESIDENCE: 2016/7

		% AUST 5 Yr average	% AUST 2015/6	% AUST 2016/7
NSW (59%)	Sydney	24.3%	24.3%	26.2%
	South Coast	11.3%	10.4%	9.7%
	Capital Country	8.6%	9.4%	12.0%
	Central NSW	2.6%	2.8%	1.4%
	Riverina	1.8%	2.4%	2.5%
	Blue Mountains	1.5%	1.6%	1.9%
	North Coast NSW	1.5%	2.1%	1.6%
	Snowy Mountains	1.4%	0.5%	0.1%
	Central Coast	1.1%	1.0%	2.0%
	Hunter	1.1%	1.2%	0.9%
	The Murray	0.5%	0.2%	0.9%
	Outback NSW	0.3%	1.5%	0.0%
	New England	0.2%	0.0%	0.3%
ACT		30.3%	32.2%	24.5%
VIC		8.9%	6.3%	12.2%
QLD		2.5%	1.6%	1.8%
SA		0.8%	1.1%	0.5%
WA		0.6%	1.1%	0.4%
TAS		0.4%	0.1%	0.8%
NT		0.1%	0.1%	0.1%
		100%	100%	100%

The vast majority of domestic overnight visitors come from within NSW, with just under half of those come from Sydney (26.2%). Nearby regions such as the South Coast (10%) and the Capital Country (12%) also provide good visitation. Although the ACT numbers declined slightly this year, the area receives strong visitation from these visitors (25%), as well as Victoria (12%), but little from the other States. As shown in Figure 3 below, visitation from Canberra has overtaken Sydney in the past 5 years while together they make over half of this market.

FIGURE 3: DOMESTIC OVERNIGHT VISITORS FROM CANBERRA AND SYDNEY



Reason for Visit (DON)

Visiting Eurobodalla for the purpose of a holiday is the primary reason to visit, with 62% of visits for this reason. However, the reason to visit has shown a slight trend toward visiting friends or relatives making up a quarter of domestic overnight visits in 2016/17, whereas visits for the purpose of holiday has dropped by 3.7% on the previous 5 year (2012-2016) average. A further 7.7% are on business and 4.6% for other reasons or in transit.

TABLE 5: DOMESTIC REASON FOR VISIT

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/17	current %	5 yr av	+/_
Holiday	462.4	516.7	482.2	520.6	543.0	**494.9**	**62.3%**	66.0%	-3.7%
VFR	158.4	136.6	214.7	170.3	170.4	**201.6**	**25.4%**	22.2%	3.2%
Business	60.9	38.8	62.8	53.1	39.6	**61.0**	**7.7%**	6.7%	1.0%
Other	10.0	5.7	11.4	16.5	24.2	**17.8**	**2.2%**	1.8%	0.5%
In transit	6.8	3.1	8.5	3.1	7.2	**18.8**	**2.4%**	0.7%	1.6%
Total	702.2	704.7	778.2	763.5	785.1	**794.1**	**100.0%**	100.0%	

Accommodation (DON)

The importance of the VFR market is also highlighted with VFR being the highest type of accommodation used (31%). Non-commercial accommodation accounts for 45% of visitors and includes weekenders (9%), friends and relatives homes (31%) and non-commercial camping (5%).

Commercial accommodation (shaded section in Table 6) accounts for 55% of accommodation used by domestic overnight visitors, including hotels and resorts (20%), commercial caravan parks (23%) and rented houses and apartments (11%).

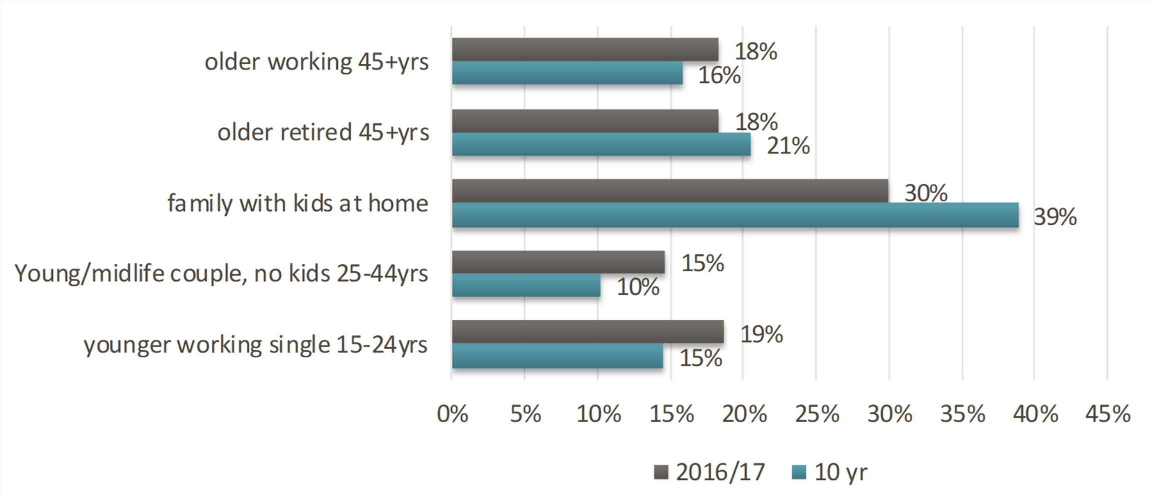
TABLE 6: ACCOMMODATION OF DOMESTIC OVERNIGHT VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/17	% of 2016/17	5 yr av
Guest house or Bed & Breakfast	9	5	9	9	12	1	0%	9
Rented house/apt/flat	86	72	48	79	98	90	11%	77
Caravan park or commercial camping ground	114	191	173	175	170	183	23%	165
Hotels/resorts	154	135	169	147	144	154	20%	150
Non commercial camp	42	18	57	43	32	36	5%	38
Own property	88	74	87	51	106	74	9%	81
Private accomm (VFR)	207	218	234	266	223	245	31%	230
Totals	700	715	777	770	785	783	100%	749

Lifecycle/travel party (DON)

Comparison between this year's lifecycle groups and the previous 10 year average shows less families and more in younger age groups. The 10 year average for families is 39% of domestic overnight visitors, whereas this decreased to 30% in 2016/7, while younger people (15-44yrs) without kids increased as shown in Figure 4 below.

FIGURE 4: DOMESTIC OVERNIGHT: LIFECYCLE (2016/7 AND 10 YR AVERAGE[4])



Analysis of the **travel party** showed similar results with 20% travelling in a family group with children, and a further 8% as friends or relatives travelling together with children.

Age (DON)

These lifestyle groups coincide with the prominent age groups as shown in the chart below with over a third of visitors over 55 years old, and 27% between 35 and 50 years of age.

TABLE 7: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/17	5 YR AV
15-19 yrs	4.2%	11.1%	2.9%	3.7%	6.1%	5.5%	5.6%
20-24 yrs	4.9%	4.8%	6.1%	3.6%	7.3%	7.7%	5.3%
25-29 yrs	6.8%	3.3%	4.7%	9.3%	6.2%	7.1%	6.1%
30-34 yrs	8.2%	8.2%	11.4%	5.3%	6.9%	9.0%	8.0%
35-39 yrs	7.4%	8.4%	5.3%	7.8%	9.2%	7.7%	7.6%
40-44 yrs	8.8%	10.3%	10.6%	9.4%	15.7%	11.9%	11.0%
45-49 yrs	12.2%	7.5%	8.2%	8.9%	7.2%	7.4%	8.8%
50-54 yrs	11.4%	7.9%	11.3%	13.3%	6.8%	7.2%	10.1%
55+ yrs	36.1%	38.6%	39.6%	38.7%	34.5%	36.5%	37.5%
	100%	100%	100%	100%	100%	100%	100%

[4] TRA data was not collected in 2014/5 for lifecycle.

Transport (DON)

The most popular transport option is for self drive 97% with 2% choosing bus/coach and 1% aircraft.

Activities (DON)

Social activities and outdoor/ nature activities continue to be the main activities undertaken in Eurobodalla. Both for those on a dedicated trip to the area and for those on a stopover, these two activities make-up the majority of tourist activity with "social activities" accounting for about 39% of all survey responses and 28% relating to "outdoor/nature activity".

FIGURE 5: DOMESTIC OVERNIGHT: ACTIVITIES

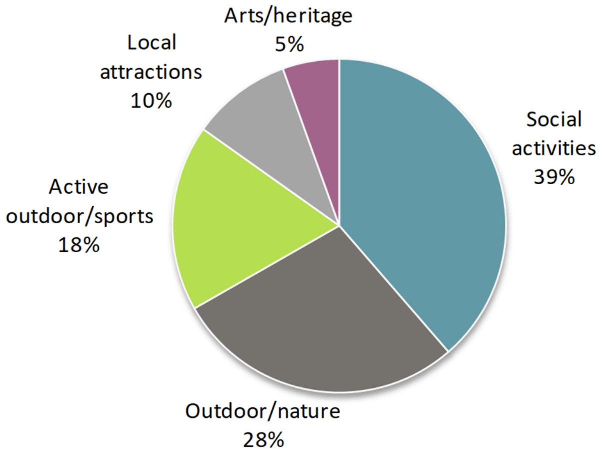
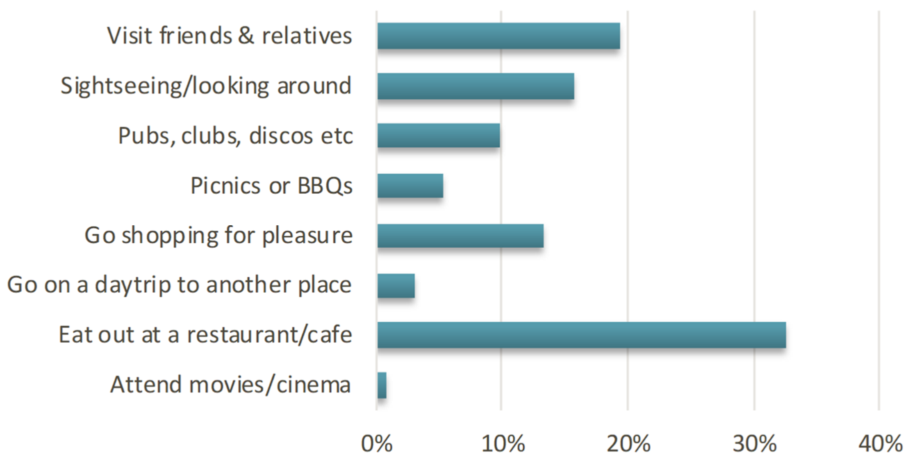


TABLE 8: DOMESTIC OVERNIGHT: ACTIVITIES

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/17	5 YR AV
Social activities	594	607	662	680	675	718	644
Outdoor/nature	380	469	492	522	515	522	476
Active sports	274	315	284	275	331	336	296
Local attractions	121	129	179	171	208	180	162
Arts/heritage	58	90	88	81	89	102	81
Total response	1428	1611	1705	1729	1818	1858	1658

Survey respondents could choose more than one response, so it is possible that these activities were both undertaken in the same trip. Further analysis of "social activities" below suggests that eating out (33% of total activities) and visiting friends/relatives (19%), sightseeing (16%) and shopping (13%) are the key activities in this segment.

FIGURE 6: DOMESTIC OVERNIGHT: SOCIAL ACTIVITIES



DOMESTIC DAY VISITORS

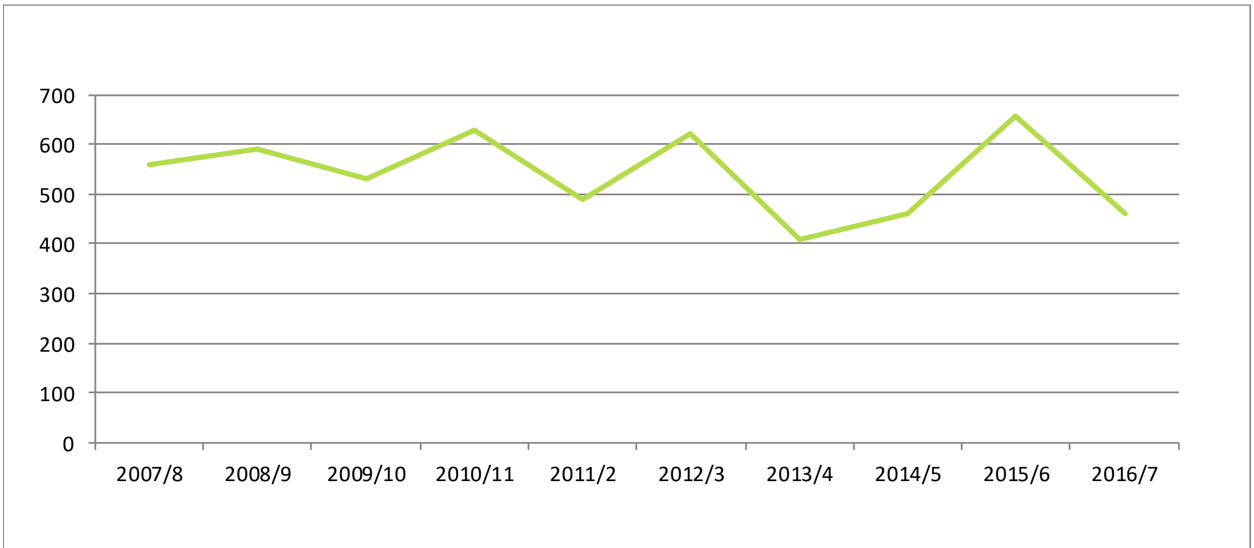
The numbers of domestic day visitors has dropped in the past financial year, however it should be noted that day visitation is often quite variable as shown in the chart below. This is not uncommon in regional areas where factors such as weather and other events can deter or encourage day visits and is aligned with decreases seen for South Coast region (see page 25).

TABLE 9: DOMESTIC DAY VISITORS: SUMMARY

Domestic Day Visitors '000	2011/2	2012/3	2013/4	2014/5	2015/6	**2016/17**	5 yr average
# of visitors	488	620	407	461	656	461	526
% increase/decrease		*27%*	*-34%*	*13%*	*42%*	*-30%*	
Spend per trip							$111
Sample size	*61*	*73*	*60*	*58*	*73*	*56*	
Lifecycle	Families, with children 27% Older retired couples 33%,						
Activities	1. Social, 2. Outdoor/nature, 3. Active sports						
Source	1. South Coast (61%), 2. Canberra (23%) 3. Sydney (7%)						

In the 5 years previous to 2016/17 there was an average of 526,250 domestic day visitors per year, however, as shown in Figure 7, the linear trendline over the last ten years shows the volatility of this market. This is typical of day visitation, which is often affected by weather events and other impacts. However, it should also 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%[5].

FIGURE 7: DOMESTIC DAY VISITORS: 2007/8 - 2016/7



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

Visitor Expenditure (DDV)

Visitor expenditure for individual LGAs is produced every two years by TRA, showing the average for domestic day visitors to Eurobodalla spend an average of $111 per trip [2]. This is higher than the average for the South Coast region ($101 per trip) and NSW ($104 per trip 2017[6]).

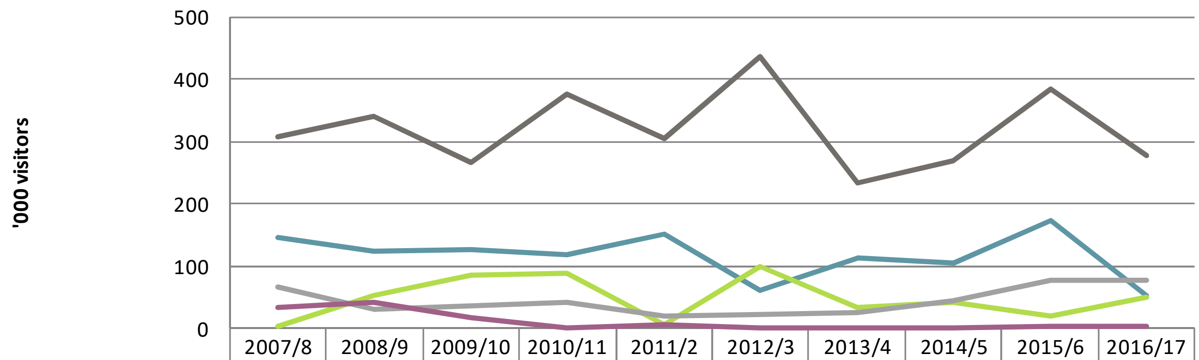
Visitor Residence (DDV)

TABLE 10: DOMESTIC DAY VISITORS: RESIDENCE

The vast majority of domestic day visitors come from within the South Coast region comprising 60% of day visitors. Other day visitors also come from Canberra and other parts of the Capital Country (28% total), and 11% from Sydney.

		5 yr av	2016/7
NSW (89%)	Sydney	8%	11%
	South Coast	62%	60%
	Capital Country	7%	17%
	Other NSW	-	-
ACT (11%)		23%	11%
VIC (<1%)		-	-
		100%	100%

FIGURE 8: DOMESTIC DAY VISITORS: TOP DOMESTIC DAY MARKETS



	2007/8	2008/9	2009/10	2010/11	2011/2	2012/3	2013/4	2014/5	2015/6	2016/17
ACT	146	124	128	120	152	62	114	104	172	52
South Coast	308	341	266	376	304	437	234	270	383	278
Sydney	4	53	85	89	7	98	32	42	21	51
Capital Country	66	31	36	43	19	23	24	45	76	77
All other regions	34	41	17	0	5	0	0	0	4	3

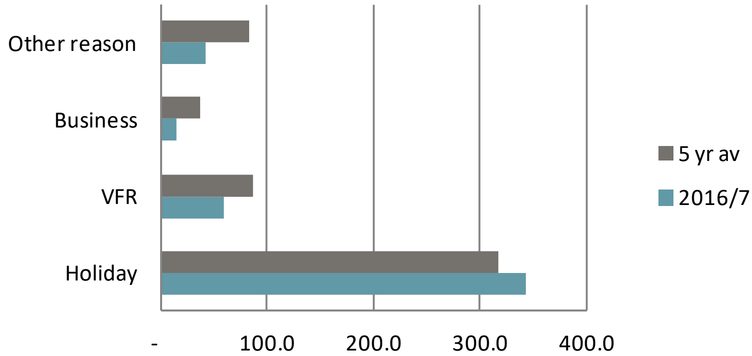
[6] http://www.destinationnsw.com.au -South-Coast-sub-region-YE-Jun-17.pdf

https://www.destinationnsw.com.au - Total-NSW-snapshot-YE-Jun-17.pdf

Reason for Visit (DDV)

Figure 9: Domestic Day Visitors: Reason

Day visitors are primarily **on holiday (75%)**, while others are visiting friends or relatives (13%), on business (3%) or there for "other reasons" (9%) - including medical reasons (8%). As shown in Figure 9 reasons to visit are very consistent with past trends over the past 5 years, with holiday visitors dropping slightly.



Transport (DDV)

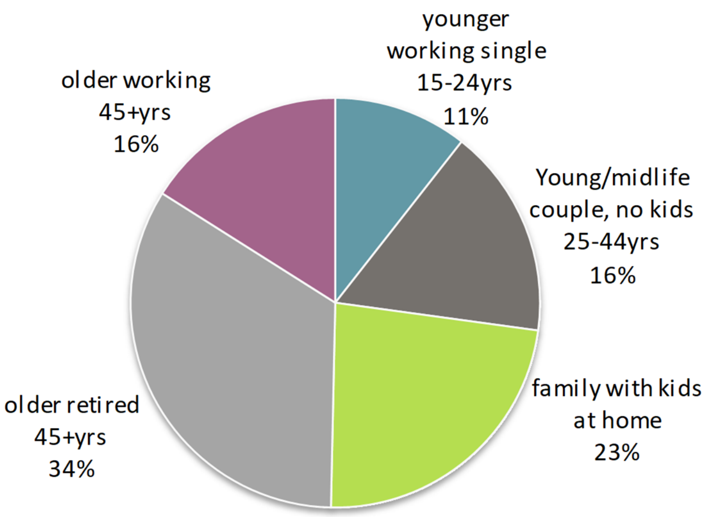
The most popular transport option is for self drive (99%) with 1% choosing the bus/coach.

Lifecycle (DDV)

There are two clear groups which remain as prominent lifecycle segments for day visitors.

- Older retired people (single or married aged 45+ yrs) **comprise 34%**,
- Families with children of any age **total 23%** of all lifecycle groups.

Figure 10: Domestic Day Visitors: Lifecycle 2016/7



Age and marital status (DDV)

As suggested in the previous section, day visitors are mostly in older age groups 55+ (52%) as well as middle age 40-45yrs (15%).

The ratio of those who are part of a couple (77%) is higher than those who are single (23%).

Males (60%) are more prominent than females (40%).

TABLE 11: AGE GROUPS OF DAY VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 YR AV
15-19 yrs	8%	0%	3%	6%	12%	6%	6%
20-24 yrs	4%	4%	0%	3%	2%	8%	3%
25-29 yrs	3%	0%	7%	12%	11%	10%	5%
30-34 yrs	17%	18%	11%	2%	7%	1%	11%
35-39 yrs	2%	10%	2%	7%	1%	1%	4%
40-44 yrs	5%	9%	9%	7%	11%	13%	9%
45-49 yrs	3%	3%	7%	6%	4%	2%	5%
50-54 yrs	10%	6%	11%	12%	12%	8%	10%
55+ yrs	49%	50%	49%	44%	39%	52%	47%
	100%	100%	100%	100%	100%	100%	100%

Main destination (DDV)

Using the SA2 categories, the main destination for day visitors and overnight visitors is Batemans Bay[7] with 62% of day visitors and 39% of overnight visitors. The second highest visitation is in Narooma[8] which receives 18% of day visitors and 33% of domestic overnight visitors.

TABLE 12: MAIN DESTINATION IN EUROBODALLA

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 yr average	day trip av %*	Overnight av %
Batemans Bay	336	357	219	262	447	306	324	62%	39%
Broulee - Tomakin	7	7	10	18	12	24	11	2%	7%
Eurobodalla Hint	16	81	44	29	20	15	38	7%	11%
Moruya - Tuross Head	47	59	28	44	92	75	54	10%	10%
Narooma	70	116	34	106	128	41	91	18%	33%
Total	488	620	366	470	706	461	518	100%	100%

** see notes on small sample size for day visits pg 14*

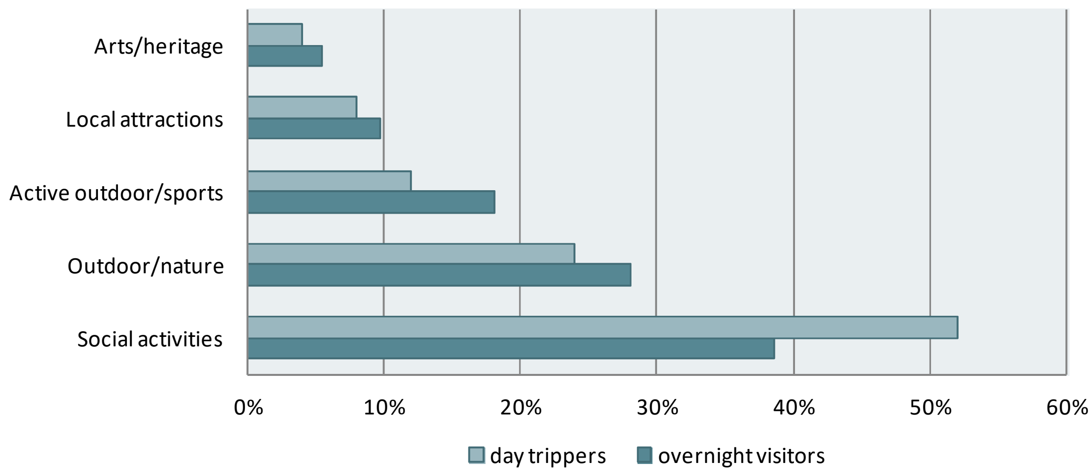
[7] includes Batemans Bay South

[8] SA2 for Narooma includes Bermagui

Activities (DDV)

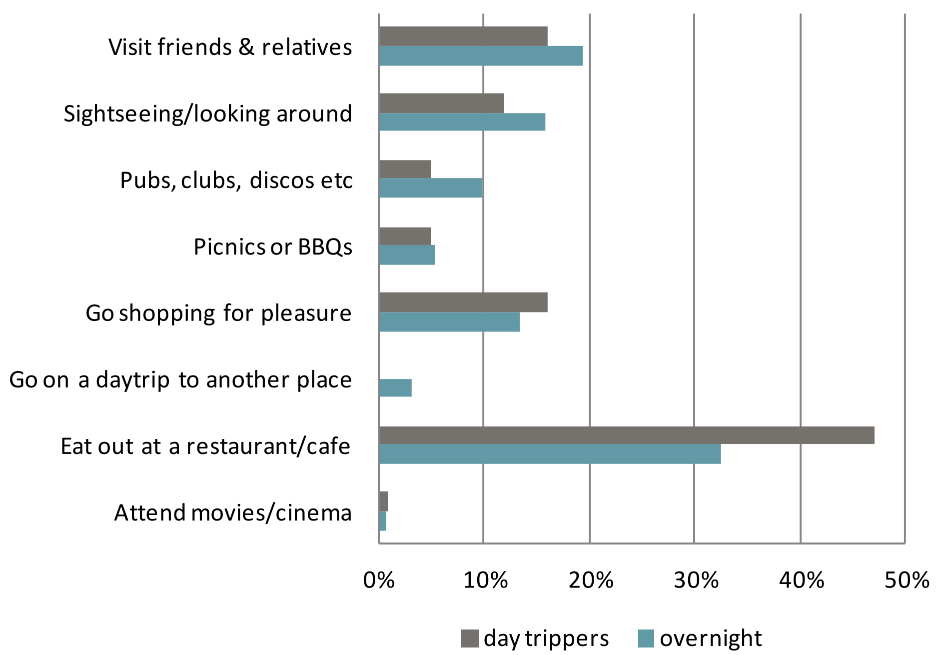
For both overnight and day visitors, the pattern of activities remains similar. Social and outdoor/nature activities are the two major activities undertaken in Eurobodalla. However as shown, day trippers undertake more social activities (52%) than overnight visitors (39%).

FIGURE 11: DOMESTIC DAY VISITORS: ACTIVITIES



As shown in Figure 12 below, the breakdown of social activities is also similar to overnight visitors with a higher proportion of visitors eating out (47% of social visitors), as well as shopping (16%). A smaller proportion are visiting friends/relatives (16%).

FIGURE 12: DOMESTIC DAY VISITORS: SOCIAL ACTIVITIES



INTERNATIONAL VISITORS

The number of international travellers has increased in the past two years to a record level in 2016/17 of approximately 37,000. This is in line with a 13.2% increase of overnight trips to regional New South Wales by international visitors in 2016/7[9].

TABLE 13: INTERNATIONAL VISITORS: SUMMARY

INTERNATIONAL '000	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 yr average
# of visitors	24	21	26	25	29	37	25
% change on year		-12%	23%	-3%	17%	25%	5.9%
Nights	105	123	101	144	91	191	113
Av night stay	4.4	5.9	3.9	5.8	3.1	5.2	4.5
Sample size	*183*	*145*	*165*	*173*	*184*	*190*	
Spend per trip	^	^	^	^	^		$327
Spend per night							$81
Activities	1. Social, 2. Outdoor/nature, 3. local attractions						
Source	All Europe incl UK (62%) Nth America (16%) All Asia (11%) UK (19%) Germany (16%) USA(10%)						

Visitor Residence (INT)

The Eurobodalla continues to attract a wide variety of international markets, with the main generating countries being the UK (23% of visitors) and Germany (18%). Table 14 shows the wide variety of geographical markets which comprise the total international market.

TABLE 14: INTERNATIONAL MARKETS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	AVERAGE
UK	24%	14%	15%	22%	18%	23%	19%
Germany*	19%	13%	19%	14%	17%	18%	16%
USA	12%	9%	10%	6%	12%	10%	10%
New Zealand	4%	7%	12%	4%	5%	7%	6%
Canada	4%	3%	6%	8%	7%	6%	6%
France*	5%	4%	5%	11%	9%	5%	7%
Malaysia	1%	0%	0%	0%	0%	4%	0%
Netherlands*	4%	5%	2%	4%	3%	4%	4%
Other Europe*	4%	10%	8%	5%	5%	4%	6%
Scandinavia*	6%	7%	3%	3%	5%	4%	5%
Italy*	0%	1%	0%	1%	0%	2%	1%
Other Asia	1%	2%	0%	0%	1%	2%	1%
Other	7%	5%	4%	5%	3%	2%	5%
Switzerland*	3%	9%	6%	5%	2%	2%	5%
China	1%	1%	4%	3%	7%	1%	3%
Japan	2%	0%	0%	0%	0%	1%	0%
Korea	0%	2%	0%	0%	1%	1%	1%

9 www.destinationnsw.com.au: South-Coast-NSW-region-YE-Jun17.pdf

When grouped further into international regions;

- countries in **Europe & UK** (marked with *) are the highest generating region (61%)
- countries in **North America** combine to 16%
- countries in **Asia** equal 12%
- all other countries 11%.

Over the past 10 years key international markets such as the UK and Germany continue to fluctuate, however they provide the bulk of international visitation. In particular Germany, USA and the UK show positive gains on the previous 10 years to return to levels seen in 2007-9. In this time emerging markets have increased slightly, including China, however they remain as smaller segments.

FIGURE 13: KEY INTERNATIONAL MARKETS

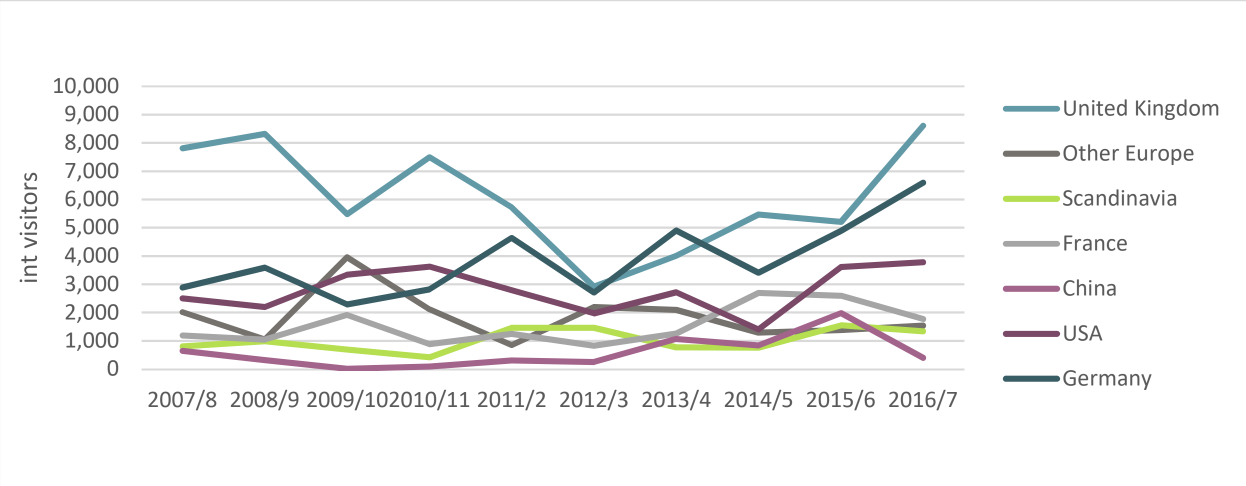


TABLE 15: CHANGES IN INTERNATIONAL MARKETS (# OF VISITORS PER YEAR)

country	2007/8	2008/9	2009/10	2010/11	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	10 year change
Germany	2,884	3,591	2,285	2,824	4,645	2,705	4,901	3,409	4,890	**6,591**	**3,707**
United States of America	2,499	2,198	3,340	3,627	2,790	1,966	2,720	1,402	3,612	**3,779**	**1,279**
United Kingdom	7,804	8,319	5,474	7,497	5,712	2,916	4,013	5,465	5,207	8,605	800
France	1,190	1,040	1,918	884	1,250	825	1,260	2,692	2,596	**1,766**	**576**
Scandinavia	802	981	691	417	1,466	1,459	776	759	1,548	**1,337**	**535**
New Zealand	2,398	2,342	2,481	2,320	1,068	1,397	3,070	1,044	1,360	2,545	147
China	644	316	13	89	304	251	1,068	844	1,981	**397**	**-246**
Other Europe	2,021	1,059	3,958	2,123	847	2,199	2,095	1,290	1,382	1,536	-485

Visitor Expenditure (INT)

Visitor expenditure for individual LGAs is produced every two years by TRA, showing the average for international visitors to Eurobodalla spend an average of $99 per night[10] and $368 per trip. This is equal to the South Coast region 2016/7 ($99 per night[11]).

Age (INT)

International visitors are in older age groups 55+ (39%) as well as young travellers 20-30yrs (27%).

TABLE 16: AGE GROUPS OF INTERNATIONAL VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 YR AV	+/-
15-19 yrs	3%	2%	4%	4%	3%	3%	3%	-
20-24 yrs	12%	13%	14%	10%	12%	15%	12%	3%
25-29 yrs	19%	18%	9%	14%	18%	12%	15%	-3%
30-34 yrs	6%	10%	5%	12%	6%	5%	8%	-3%
35-39 yrs	9%	13%	4%	4%	9%	4%	8%	-4%
40-44 yrs	7%	4%	3%	7%	4%	5%	5%	-
45-49 yrs	10%	7%	13%	4%	6%	11%	8%	3%
50-54 yrs	8%	6%	6%	7%	7%	6%	7%	-1%
55+ yrs	27%	27%	45%	37%	37%	39%	35%	4%
	100%	100%	100%	100%	100%	100%	100%	

Lifecycle and parents

The lifecycle group of international visitors is different to the domestic traveller. Over the previous past 5 years (2011-16), families with a parent of children under 15 yrs have represented only 8% of visitors, compared to 19% of domestic day visitors and 37% domestic overnight.

TABLE 17: PARENTS OF CHILDREN UNDER 15

PARENTS OF CHILDREN	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 YR AVERAGE
International	6%	14%	6%	2%	11%	16%	8%
Domestic Day	35%	22%	^	13%	19%	23%	19%
Domestic Overnight	44%			40%	33%	30%	37%

[10] TRA (2016) LGA report for Eurobodalla

[11] http://www.destinationnsw.com.au -South-Coast-region-YE-Jun-17.pdf

Travel Party (INT)

Both singles (40%) and couples (35%) are the major international travel groups, with families making 11% of the total. Other features of the travel parties;

- males comprise 47% and females **53%**
- 24% of international visitors are **backpackers**
- a decreasing number are on package tours 6% (down from 11% in 2011-13)
- most are independent travellers (99% are **not** on a group tour).

TABLE 18: TRAVEL PARTY FOR INTERNATIONAL VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	**2016/7**	**% of total 2016/7**	5 yr average
Single traveller	8,809	6,732	11,891	10,534	12,306	14,662	40.5%	10,054
Adult couple	9,744	8,273	9,063	11,649	11,575	12,833	35.5%	10,061
Family group	1,492	3,145	1,743	711	2,822	4,051	11.2%	1,983
Friends/relatives travelling	3,340	2,948	3,246	2,122	2,696	4,653	12.9%	2,870
Total	23,959	21,098	25,944	25,017	29,400	36,600	100.0%	25,083

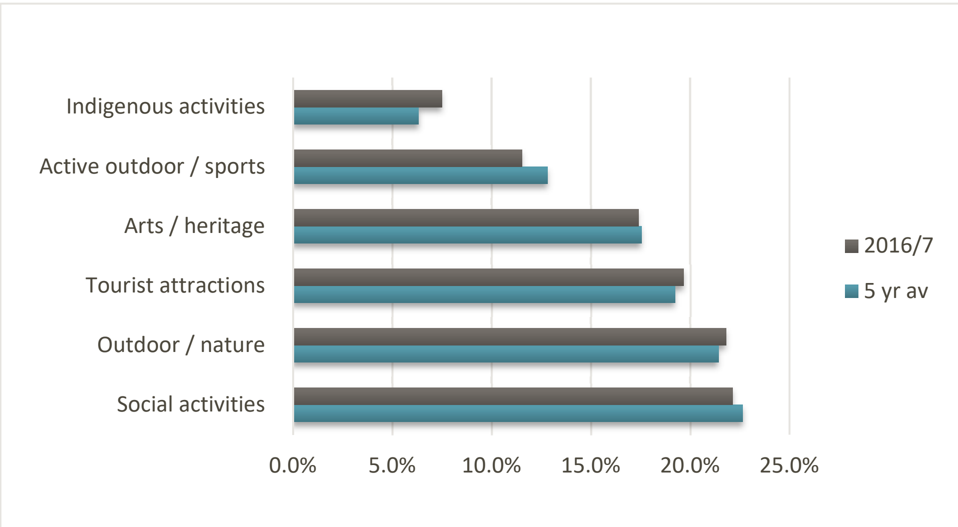
Reason for Visit (INT)

This year's international visitors follow the same pattern as previous years with most overnight visitors **on a holiday (85%)**, while others are visiting friends or relatives (11%), and a smaller ratio are here on business (2%) or other reasons including education (1%) or being in transit (1%).

Activities (INT)

Social activities (22%) and outdoor/nature activities (21%) are the two major activities undertaken by International visitors in Eurobodalla, along with local tourists attractions (19%).

FIGURE 14: INTERNATIONAL ACTIVITIES



Transport (INT)

Clearly the most popular transport option is for international markets is self drive (91%), with 6% choosing the bus/coach and 3% aircraft.

TABLE 19: TRANSPORT FOR INTERNATIONAL VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 yr average	% of 2016/7 total
Aircraft	0.2	0.2	1.7	0.7	0.9	1.3	0.7	4%
Self drive vehicle	21.9	20.4	22.9	22.5	27.2	33.3	23.0	91%
Bus/coach	1.9	0.5	1.7	2.0	1.7	3.3	1.6	9%
Total	24.0	21.1	25.9	25.0	29.4	36.3	25.1	100%

Place of arrival (INT)

The majority of international visitors arrived at Sydney airport (51%) with the other 49% arriving in a variety of places in Australia, including Melbourne (28%) and for the first time in Canberra (0.02%).

TABLE 20: PLACE OF ARRIVAL FOR INTERNATIONAL VISITORS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	5 yr average	% of total
Sydney	15.6	12.6	14.4	14.4	17.0	18.9	14.8	51%
Melbourne	4.6	5.4	6.4	6.3	8.5	10.5	6.2	28%
Brisbane	1.9	2.0	1.4	1.8	1.6	2.3	1.7	6%
Perth	0.4	0.6	1.6	1.1	0.8	2.8	0.9	7%
Adelaide	0.4	0.3	0.6	1.2	0.1	1.2	0.5	3%
Darwin	0.6	0.1	1.1	-	0.5	0.2	0.5	0%
Cairns	0.3	0.1	0.1	0.2	0.8	0.1	0.3	0%
Canberra	-	-	-	-	-	0.02	-	0%
Total	24.0	21.1	25.9	25.0	29.4	36.6	25.1	100%

Accommodation (INT)

Commercial accommodation (shaded section in Table 22) accounts for 72% of accommodation used, including hotels and resorts (28%) and commercial caravan parks (34%).

Non commercial accommodation includes friends and relatives homes (19%) and non commercial camping (9%) accounts for 28%.

TABLE 21: ACCOMMODATION FOR INTERNATIONAL TRAVELLERS

	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	% of total	5 yr average
Guest house or Bed & Breakfast	1,598	1,049	1,126	1,368	155	768	2%	4%
Rented house/apt/flat	1,634	782	1,761	691	1,329	1,166	3%	5%
Caravan park or commercial camping ground	5,673	6,239	7,997	5,469	6,973	12,425	34%	25%
Backpacker or hostel	1,566	929	1,881	1,820	1,831	1,936	5%	6%
hotels/resorts	7,484	6,679	7,392	7,392	9,655	10,300	28%	30%
non commercial camping	2,565	2,514	2,575	2,827	3,172	3,198	9%	11%
private accomm (VFR)	6,526	5,359	6,333	8,737	9,955	6,912	19%	18%

2016/7 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 22: Comparison regions

		2015/16 visitors	2016/17 visitors	2016/7 nights	*% increase on previous year visitors*
Eurobodalla 13% of South Coast	Domestic day	656	461	^	-30%
	Domestic overnight	785	793	2,630	1%
	International	29	37	191	28%
	Total	***1470***	***1291***	*2821*	-12%
Port Stephens	Domestic day	751	620	^	-17%
	Domestic overnight	619	655	2,074	6%
	International	26	38	177	46%
	Total	***1396***	***1313***	2251	-6%
Shoalhaven 31% of South Coast	Domestic day	1773	1436	^	-20%
	Domestic overnight	1408	1532	4232	9%
	International	42	53	260	26%
	Total	***3223***	***3021***	4136	-6%
Bega 8% of South Coast	Domestic day	291	371	^	27%
	Domestic overnight	368	388	1382	5%
	International	33	39	130	18%
	Total	***692***	***798***	1512	15%
South Coast	Domestic day	7066	5911	^	-16%
	Domestic overnight	3500	3700	11400	6%
	International	134	174	2752	30%
	Total	***10700***	***9785***	14152	-9%

^ not applicable

Appendix 1

Activity Segments and items

Outdoor / nature activities	***Active outdoors / sports activities***	***Arts / heritage activities***	***Indigenous culture activities***	***Local attractions/ tourist activities***	***Social / other activities***
1. Go to the beach (incl. swimming, taking a picnic etc)	7. Go fishing	11. Attend theatre, concerts or other performing arts	15. Experience Aboriginal art/craft and cultural displays	18. Visit amusement / theme parks	24. Visit pubs, clubs and nightclubs
2. Visit national parks and/or state parks	8. Play golf	12. Visit museums or art galleries	14. Visit an Aboriginal site/community	19. Visit wildlife parks / zoos / aquariums	27. Visit casinos
41. Go bushwalking and/or rainforest walks	31. Scuba diving	13. Visit art / craft workshops / studios	37. Attend an Aboriginal performance (eg. dance, theatre)	20. Go on guided tours or excursions	47. Eat out/dine at a restaurant and/or café
3. Visit botanic gardens or other public gardens	32. Snorkelling	14. Attend festivals / fairs or cultural events		21. Go to markets (eg. street, arts & crafts)	28. Attend an organised sporting event
4. Go whale / dolphin watching (in the ocean)	38. Surfing	17. Visit historical / heritage buildings, sites or monuments		22. Tourist trains	29. Go shopping (for pleasure)
5. Visit the outback	34. Water sports (eg. sailing, windsurfing, kayaking, etc)			33. Go on a charter boat/cruise/ferry ride	35. Undertake a short educational course (eg. intensive English course)
4. Visit farms	44. Snow sports			34. Visit a health spa / sanctuary / well-being centre	50. Sightseeing/looking Around
40. Visit the reef#	45. Other outdoor activities (eg. horse riding, rock climbing, bungee jumping, four wheel driving, reef walking etc)			24. Visit wineries	51. Attend Movies/Cinema
	49. Go cycling				33. go on a day trip to another place
	48. Other sports				34. go on picnics / BBQ's#