

# Eurobodalla Tourism Monitor

Quarter Snapshot: October to December 2018



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Authored by: Dr Jo Mackellar

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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 Eurobodalla 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. 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.
- 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. This caused some small changes to previously published data. The TRA revised estimates for 2014 and 2015 data HAS BEEN included in this report.
- 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 HAVE BEEN included in this report.

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

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

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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.

Enquiries should be directed to the Research Manager, [destination.research@yahoo.com](mailto:destination.research@yahoo.com)

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## Single Quarter: October to December

- The December (Oct to Dec) quarter in 2018 showed a substantial increase in *domestic overnight* visitors (21%) from the same quarter in the previous years. There was also an increase in the number of visitor nights of 56% as visitors stayed for longer (av. 3.3 nights).
- The numbers of *domestic day* visitors also increased 51% from the previous year.
- The numbers of *international visitors* stayed equal to the same quarter in the previous year while the number of nights stayed was significantly reduced.
- **Overall the total number of visitors increased by 31% as did the nights visitors stayed (39%).**

'000 visitors	Dec quarter 2014	Dec quarter 2015	Dec quarter 2016	Dec quarter 2017	Dec quarter 2018	Five year average
<b>Domestic overnight visitors</b>	187	223	196	196	238	208
<b>% increase</b>		19%	-12%	0%	21%	7%
<b>nights</b>	682	732	586	502	782	657
<b>% increase</b>		7%	-20%	-14%	56%	7%
<b>av night stay</b>	<b>3.6</b>	<b>3.3</b>	<b>3.0</b>	<b>2.6</b>	<b>3.3</b>	3.2
<b>Domestic day visitors</b>	147	77	148	102	154	126
<b>% increase</b>		-48%	92%	-31%	51%	16%
<b>International</b>	8	9	8	10	10	9.0
<b>% increase</b>		13%	-11%	25%	0%	7%
<b>International nights</b>	59	38	40	78	22	47
<b>av night stay</b>	7.4	4.2	5.0	7.8	2.2	5.3
<b>total visitors '000</b>	<b>342</b>	<b>309</b>	<b>352</b>	<b>308</b>	<b>402</b>	343
<b>% increase</b>		-10%	14%	-13%	31%	6%
<b>total nights '000</b>	<b>741</b>	<b>770</b>	<b>626</b>	<b>580</b>	<b>804</b>	704
<b>% increase</b>		4%	-19%	-7%	39%	

\*all figures rounded to the nearest thousand

## Comparative regions

Comparisons have been made to four other competitor destinations - which are local government areas of similar size in coastal areas. All 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.

OCT TO DEC 2018		Visitors	Nights	Av stay
		'000	'000	Nights
Port Stephens	Domestic day	223	^	^
	Domestic overnight	210	541	2.6
	International	11	59	5.4
	<b>Total</b>	<b>444</b>	<b>600</b>	
Port Macquarie	Domestic day	149	^	^
	Domestic overnight	203	635	3.1
	International	25	100	4.0
	<b>Total</b>	<b>377</b>	<b>735</b>	
Eurobodalla	Domestic day	154	^	^
	Domestic overnight	238	782	3.3
	International	10	22	2.2
	<b>Total</b>	<b>402</b>	<b>804</b>	
Shoalhaven	Domestic day	336	^	^
	Domestic overnight	394	1196	3.0
	International	16	122	7.6
	<b>Total</b>	<b>746</b>	<b>1318</b>	
Sapphire Coast	Domestic day	88	^	^
	Domestic overnight	109	370	3.4
	International	9	124	13.8
	<b>Total</b>	<b>206</b>	<b>494</b>	
South Coast	Domestic day	1504	^	^
	Domestic overnight	1089	3226	3.0
	International	57	649	11.4
	<b>Total</b>	<b>2650</b>	<b>3875</b>	



## Rolling year analysis

- The rolling year total is 22% higher than last year for ALL VISITORS.
- The rolling year total is higher for domestic segments, and the same for international visitors.
- Oct – December comprises approx. 26% of yearly visitation, with Jan – March comprising 37%.

Quarter	JAN-MAR 2018	APR-JUNE 2018	JULY-SEP 2018	OCT-DEC 2018	rolling year total 2018	Previous rolling year 2017
<b>Domestic overnight visitors</b>	319	181	160	<b>238</b>	<b>898</b>	795
<b>% increase</b>	63%	-43%	-12%	<b>49%</b>	<b>13%</b>	
Nights	1258	609	384	<b>782</b>	<b>3033</b>	2,661
<b>% increase</b>	151%	-52%	-37%	<b>104%</b>	<b>14%</b>	
<b>Av night stay</b>	3.9	3.4	2.4	<b>3.3</b>	<b>3.4</b>	3.3
<b>Domestic day visitors</b>	153	137	163	<b>154</b>	<b>607</b>	431
<b>% increase</b>	50%	-10%	19%	<b>-6%</b>	<b>41%</b>	
<b>International visitors</b>	13	8	7	<b>10</b>	<b>38</b>	38
<b>% increase</b>	30%	-38%	-13%	<b>43%</b>	<b>0%</b>	
<b>International nights</b>	42	16	15	<b>22</b>	<b>95</b>	174
<b>% increase</b>	-46%	-62%	-6%	<b>47%</b>	<b>-45%</b>	
<b>Av night stay</b>	3.2	2.0	2.1	<b>2.2</b>	<b>2.5</b>	4.6
Total visitors	485	326	330	<b>402</b>	<b>1543</b>	1264
Total nights '000	1300	625	399	<b>804</b>	<b>3128</b>	2835

## Expenditure for Eurobodalla

The most current expenditure statistics are published by TRA as a four year average for the year ending December 2017<sup>1</sup>. They are compared to the 2016 statistics below showing a gradual increase.

	Av. spend per person per trip in Eurobodalla		Average spend per night	
	2016	2017	2016	2017
Domestic overnight visitors	\$421	\$432	\$118	\$128
Domestic daytrip visitors	\$111	\$101	\$111	\$101
International overnight visitors	\$368	\$386	\$71	\$78

**The total yearly expenditure of these three markets is approximately \$356 million in direct visitor expenditure for the year ending December 2017.**

<sup>1</sup> TRA (2016) (2017) LGA Profile for Eurobodalla. Year end Dec.