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SHOALHAVEN CITY COUNCIL

TOURISM IN THE SHOALHAVEN



**PROFILE AND STATEMENT
OF ECONOMIC IMPACT
For the year ending 31 December 2009**

7th September 2010

Executive Summary

SHOALHAVEN CITY - A place of beauty, beaches and bush

Shoalhaven City, on the South Coast of NSW, is 160km south of Sydney and stretches for a further 160km "as the crow flies". Its' main centres are Nowra, Ulladulla and Jervis Bay.

The Shoalhaven takes in the coast, the fertile plains, the rugged mountain escarpment and the panoramic views of the eastern seaboard. Within the City there are over 300,000 hectares of National Parks and State Forests, there are rivers, coastal lakes, estuaries and many miles of navigable waterways

Shoalhaven City has a population of 97,000. With tourism visitation this swells to 320,000 during peak holiday times which occur from Boxing Day onwards for approximately 2 weeks and at Easter each year. Projections indicate that the Shoalhaven's population will grow to 109,200 by 2016.

Shoalhaven City, Jervis Bay Territory, Wollongong City, Shellharbour City, Kiama Municipality, Eurobodalla Shire and Bega Valley Shire together are recognised by the NSW Government, (Tourism New South Wales), as the South Coast Region.

The following estimates have been prepared for Shoalhaven City for the 12 months ending 31 December 2009.

They include Shoalhaven City Local Government Area and Jervis Bay Territory

Year Ending December 2009	Shoalhaven (Incl. JBT)
Number of Domestic Overnight Visitors	1,131,000
Number of Domestic Visitor Nights	3,966,000
Number of Domestic Day Visitors	1,360,000
Expenditure-Domestic Overnight visitors	\$491,784,000
Expenditure by Day Visitors	\$111,520,000
International Visitors	
Number of Visitors	34,000
Number of Visitor Nights - unreliable data	160,000
Number of Day visitors - unreliable data	20,000
Expenditure by International Overnight Visitors	\$12,000,000
Expenditure by International Day Visitors	\$1,640,000
Totals	\$616,944,000
Total Expenditure by all Visitors	\$617,000,000

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2009*

The following report has been prepared as a statement of the level of tourism activity within the City of Shoalhaven and the economic impact, in gross terms, on the City, during 2009. If figures for 2009 are not available then the "most recent year" figures have been used. These are noted throughout the report.

Definition of Tourism

For the purpose of this exercise, a tourist is defined as any person who is not a resident of Shoalhaven City who visits the Shoalhaven City for any reason, for any length of time, for less than three months duration.

Expenditure by Visitors

Expenditure estimates have been calculated using the following source:- Tourism Research Australia. Travel Expenditure by Domestic and International Visitors in Australia's regions. Year ended 31 December 2009

Travel Expenditure by Visitors
ref Tourism Research Australia
Year Ended 31 Dec 2009
South Coast Domestic - \$124 per night
South Coast Domestic - \$82 per day
Regional NSW Domestic - \$134 per night
Regional NSW Domestic - \$101 per day
South Coast International \$75 per night in the region
South Coast International - \$82 per day (assumed same as domestic)
NSW International \$95 per night in the region
NSW International - \$104 per day (assumed same as domestic)

Year Ending December 2009	Shoalhaven (Incl. JBT)	South Coast	NSW
Number of Domestic Overnight Visitors	1,131,000	2,900,000	22,600,000
Number of Domestic Visitor Nights	3,966,000	10,300,000	77,000,000
Number of Domestic Day Visitors	1,360,000	5,241,000	46,500,000
Expenditure-Domestic Overnight visitors	\$491,784,000	\$1,277,200,000	\$12,243,000,000
Expenditure by Day Visitors	\$111,520,000	\$429,762,000	\$4,836,000,000
International Visitors			
Number of Visitors	34,000	106,000	2,700,000
Number of Visitor Nights - unreliable data	160,000	1,736,000	61,300,000
Number of Day visitors - unreliable data	20,000	160,000	
Expenditure by International Overnight Visitors	\$12,000,000	\$130,200,000	\$5,823,500,000
Expenditure by International Day Visitors	\$1,640,000	\$13,120,000	
Total Expenditure by all Visitors	\$616,944,000	\$1,850,282,000	\$22,902,500,000
Total Expenditure by all Visitors (rounded)	\$617,000,000	\$1,850,000,000	\$22,900,000,000

Visitor Nights

A visitor night is defined as one person staying for one night within the boundaries of the City of Shoalhaven.

Tourists can use various types of accommodation. These are hotel/motel, private hotel/guest house, rented flat/house, own holiday house/flat, friends or relatives home, farm, cabin in caravan park, on-site caravan, other in camping ground, other not in camping ground, boat/cabin cruiser, house boats, bed and breakfast establishments or other forms.

The following 2 tables have been taken from the National Visitors Survey and the International Visitors Survey and have been supplied by *Peter Valerio, Tourism Strategy Advisor, Contact details: 0419 415703 (+61 419415703 from overseas) PO BOX 1839 BOWRAL NSW 2576 AUSTRALIA*

These tables show

- Number of Visitors
- Visitor Nights

on a Local Government Level



Hobie Cat State Titles, Plantation Point Vincentia Jervis Bay.

National Visitors Survey and the International Visitors Survey and have been supplied by *Peter Valerio, Tourism Strategy Advisor, Contact details: 0419 415703 (+61 419415703 from overseas) PO BOX 1839 BOWRAL NSW 2576 AUSTRALIA*

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2009*

Local Government Visitation 2009					
Domestic Visits			Domestic Visitor Nights		
rank	2009	2009 Overnight Visits '000	rank	2009	2009 Visitor Nights '000
	Sydney	6,800		Sydney	19,100
1	Shoalhaven (incl JBT)	1,131	1	Shoalhaven (incl JBT)	3,966
2	Newcastle	797	2	Hastings (Port Macquarie))	2,339
3	Coffs Harbour	673	3	Newcastle	2,270
4	Gosford (C)	649	4	Eurobodalla (A)	2,229
5	Port Stephens (A)	627	5	Port Stephens (A)	2,197
6	Hastings (Port Macquarie)	617	6	Coffs Harbour	2,191
7	Eurobodalla (A)	612	7	Great Lakes (A)	2,084
8	Tweed	482	8	Gosford	1,921
9	Great Lakes	481	9	Bega Valley	1,855
10	Wollongong (C)	473	10	Byron Shire	1,849
11	Wyang	438	11	Tweed	1,830
12	Byron (A)	433	12	Clarence Valley	1,786
13	Bega Valley	429	13	Snowy River	1,499
14	Tamworth	402	14	Wyang	1,420
15	Snowy	399	15	Wollongong	1,244
	Kiama	258		Kiama	776
	Shellharbour	70		Shellharbour	242

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Tourism Research Australia 2010 (unpublished data)

Visit estimates are based on the addition of visits to SLAs within the LGA and does not account for the same person visiting both SLAs on the one trip. The difference, however, is likely to be very small

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
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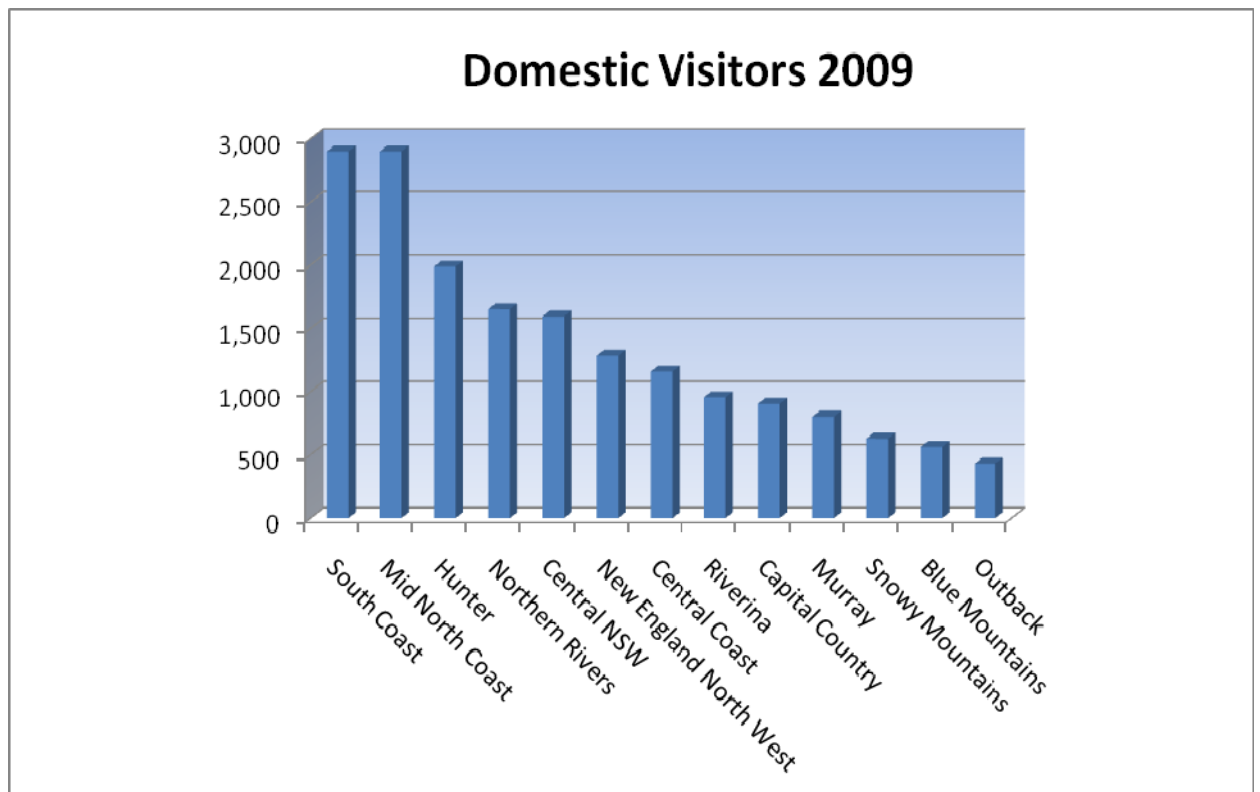
Comparative Figures 2008 to 2009						
Domestic Visits			Domestic Visitor Nights			
Overnight Visits	'000			Visitor Nights	'000	
Tourism Numbers						
2007	Shoalhaven (incl JBT)	1,111		2007	Shoalhaven (incl JBT)	3,697
2008	Shoalhaven (incl JBT)	1,294		2008	Shoalhaven (incl JBT)	4,129
2009	Shoalhaven (incl JBT)	1,131		2009	Shoalhaven (incl JBT)	3,966
	Change	87.4%			Change	96%
2008	South Coast	3,219		2008	South Coast	11,363
2009	South Coast	2,900		2009	South Coast	10,300
	Change	90%			Change	90.6%
Shoalhaven as a Percentage of South Coast						
	Shoalhaven (incl JBT)	38.7%			Shoalhaven (incl JBT)	38.5%
Tourism Income (\$million)						
2008	Shoalhaven (incl JBT)	629				
2009	Shoalhaven (incl JBT)	617	Change	98.1%		
2008	South Coast	2,004				
2009	South Coast	1,850	Change	92.3%		

South Coast Comparisons with other Regions

	YE Dec 2009	Visitors (,000)	Visitor Nights (,000)	Day Visitors (,000)	Int'l Visitors (,000)	Int'l Nights (,000)	Tourism expend \$m
	NSW	22,600	77,000	46,500	2,700	61,300	22,903
	Lord Howe Island	n/a	n/a	n/a	n/a	n/a	n/a
1	Sydney	6,800	19,100	16,200	2,500	52,500	11,503
2	South Coast	2,900	10,300	5,241	106	1736	1,837
3	Mid North Coast	2,900	11,700	2,430	151	876	1,722
4	Hunter	1,986	5,322	4,821	115	1,717	1,418
5	Northern Rivers	1,651	6,747	2,917	232	1,818	1,282
6	Central NSW	1,594	4,154	2,195	39	n/a	844
7	Central Coast	1,162	3,533	3,117	33	n/a	798
8	New England North West	1,283	3,886	1,927	50	n/a	706
9	Snowy Mountains	628	2,232	419	18	n/a	673
10	Riverina	955	2,275	1,163	25	n/a	506
11	Murray	802	2,472	829	15	n/a	449
12	Capital Country	903	2,065	2,044	20	n/a	442
13	Blue Mountains	563	1,305	2,082	71	n/a	436
14	Outback	431	1,608	169	14	n/a	235

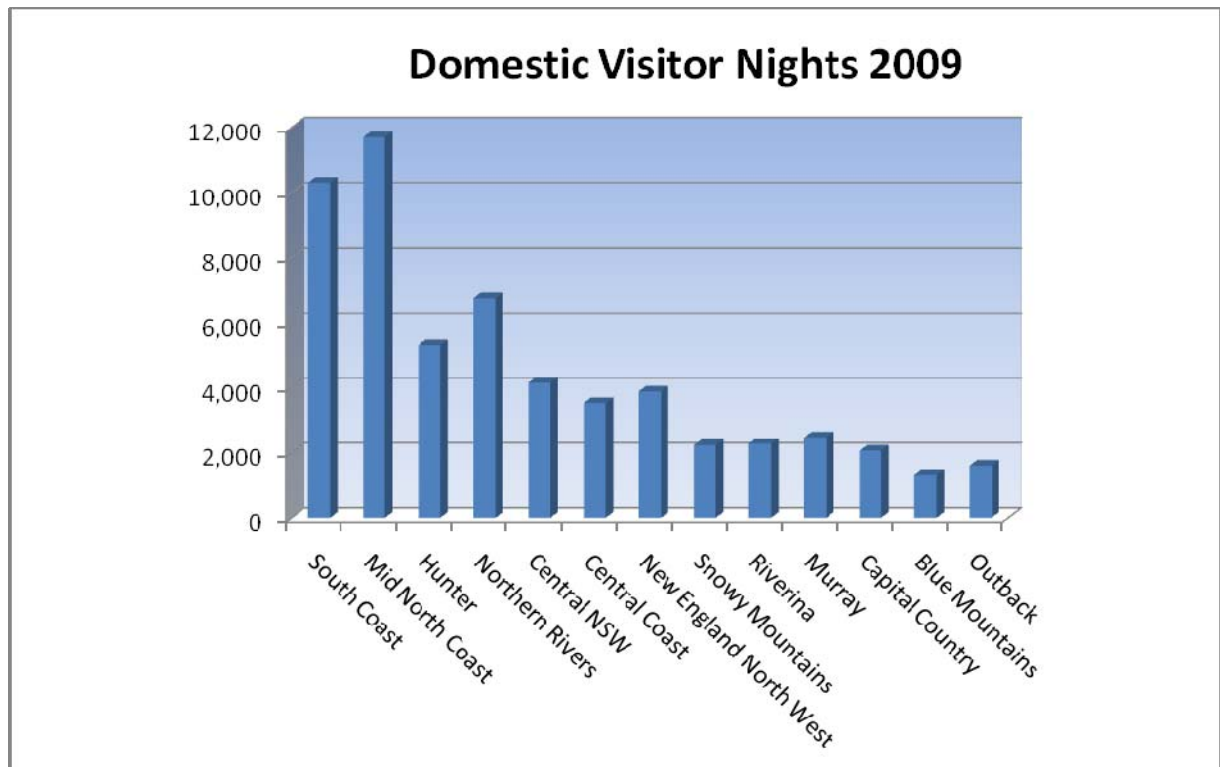
Domestic Visitors - Regions in NSW

	Region for YE Dec 2009	Domestic Visitors '000
1	Sydney	6,800
2	South Coast	2,900
3	Mid North Coast	2,900
4	Hunter	1,986
5	Northern Rivers	1,651
6	Central NSW	1,594
7	New England North West	1,283
8	Central Coast	1,162
9	Riverina	955
10	Capital Country	903
11	Murray	802
12	Snowy Mountains	628
13	Blue Mountains	563
14	Outback	431



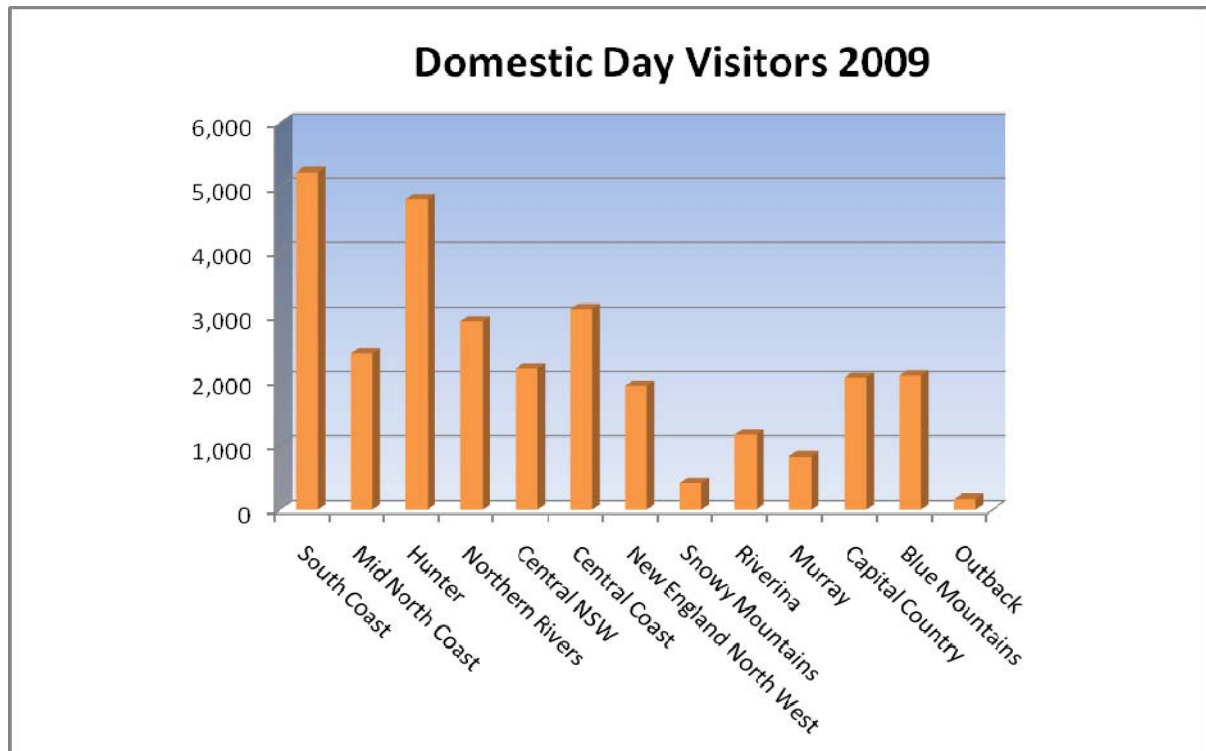
Domestic Visitor Nights - Regions in NSW

	Region for YE Dec 2009	Visitor Nights '000
1	Sydney	19,100
2	South Coast	10,300
3	Mid North Coast	11,700
4	Hunter	5,322
5	Northern Rivers	6,747
6	Central NSW	4,154
7	Central Coast	3,533
8	New England North West	3,886
9	Snowy Mountains	2,232
10	Riverina	2,275
11	Murray	2,472
12	Capital Country	2,065
13	Blue Mountains	1,305
14	Outback	1,608



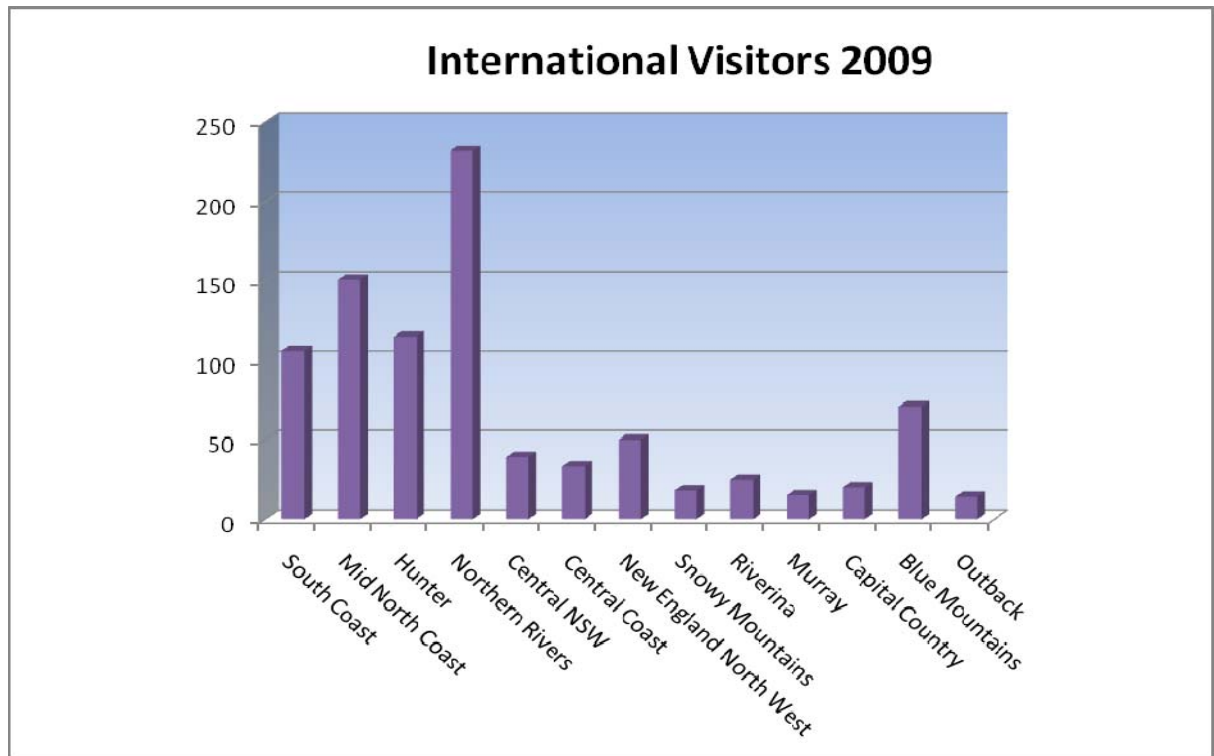
Day Visitors - Regions in NSW

	Region YE Dec 2009	Day Visitors (,000)
1	Sydney	16,200
2	South Coast	5,241
3	Mid North Coast	2,430
4	Hunter	4,821
5	Northern Rivers	2,917
6	Central NSW	2,195
7	Central Coast	3,117
8	New England North West	1,927
9	Snowy Mountains	419
10	Riverina	1,163
11	Murray	829
12	Capital Country	2,044
13	Blue Mountains	2,082
14	Outback	169



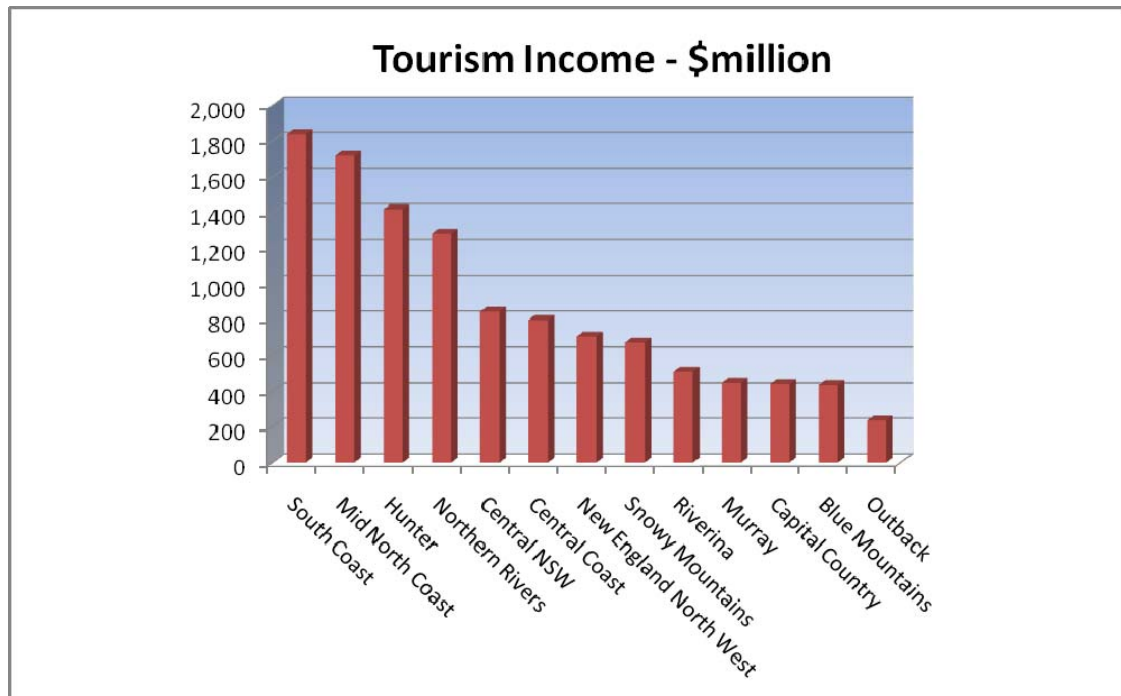
International Visitors - Regions in NSW

	Region YE Dec 2009	Int'l Visitors (,000)
1	Sydney	2,500
2	South Coast	106
3	Mid North Coast	151
4	Hunter	115
5	Northern Rivers	232
6	Central NSW	39
7	Central Coast	33
8	New England North West	50
9	Snowy Mountains	18
10	Riverina	25
11	Murray	15
12	Capital Country	20
13	Blue Mountains	71
14	Outback	14



Tourism Income – Regions – 2009

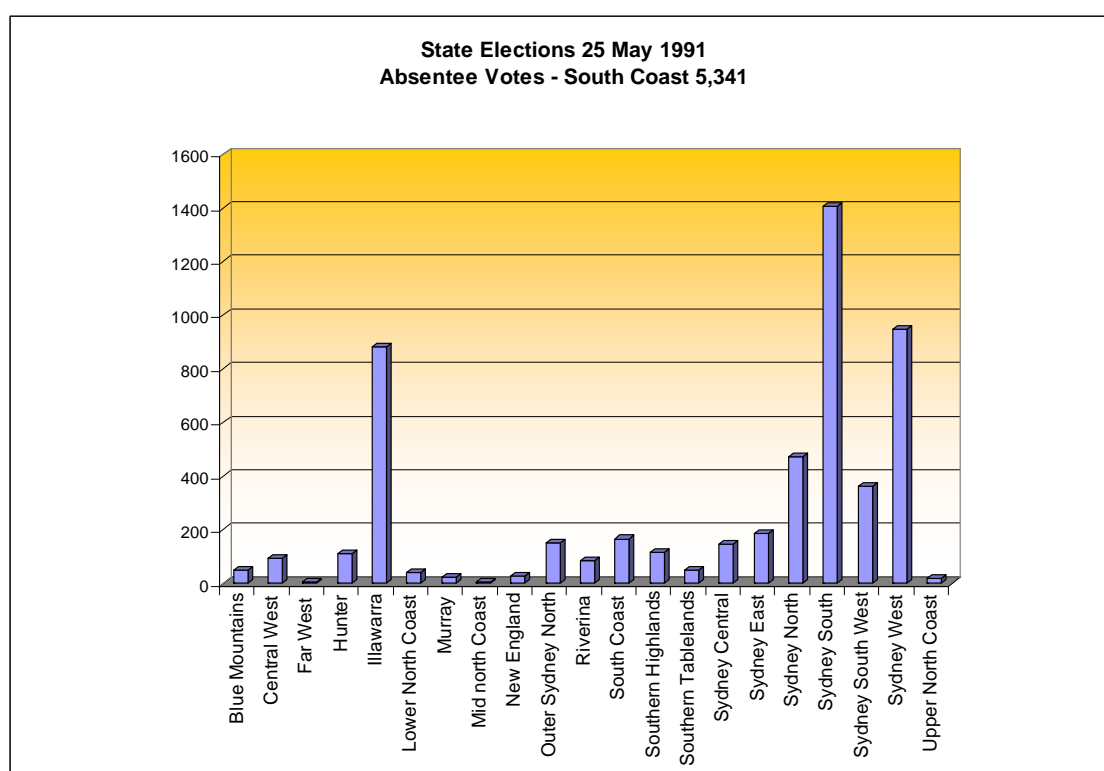
	Region for YE Dec 2009	Tourism expend \$m
1	Sydney	11,503
2	South Coast	1,837
3	Mid North Coast	1,722
4	Hunter	1,418
5	Northern Rivers	1,282
6	Central NSW	844
7	Central Coast	798
8	New England North West	706
9	Snowy Mountains	673
10	Riverina	506
11	Murray	449
12	Capital Country	442
13	Blue Mountains	436
14	Outback	235



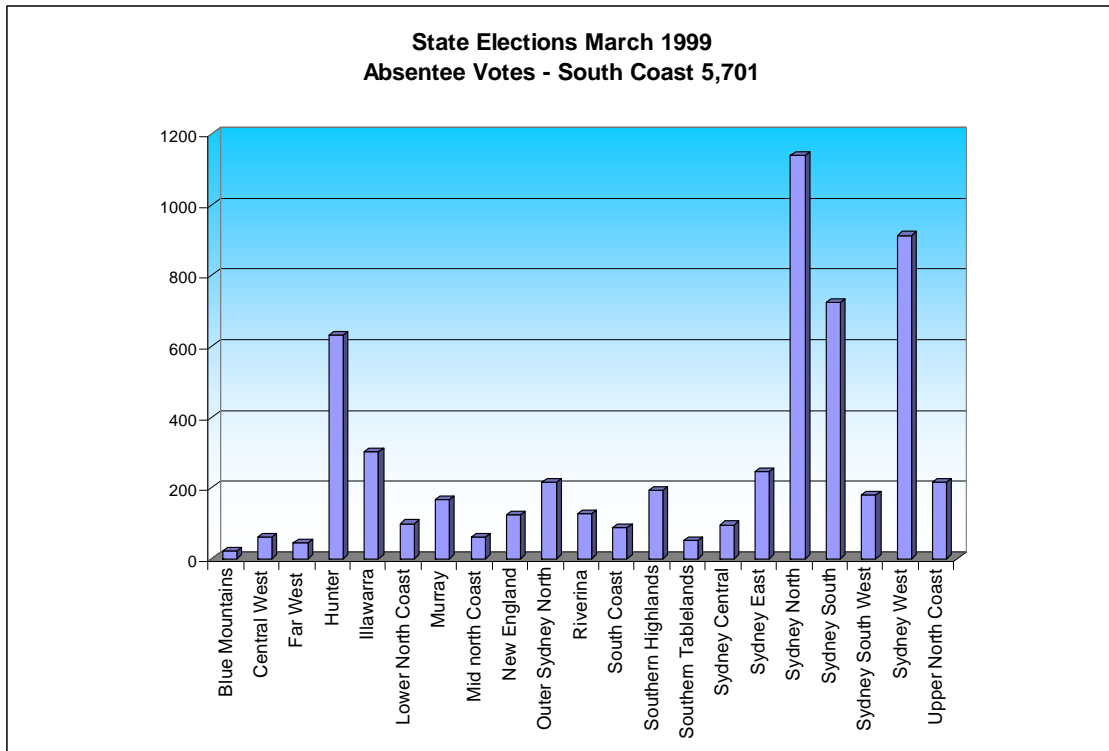
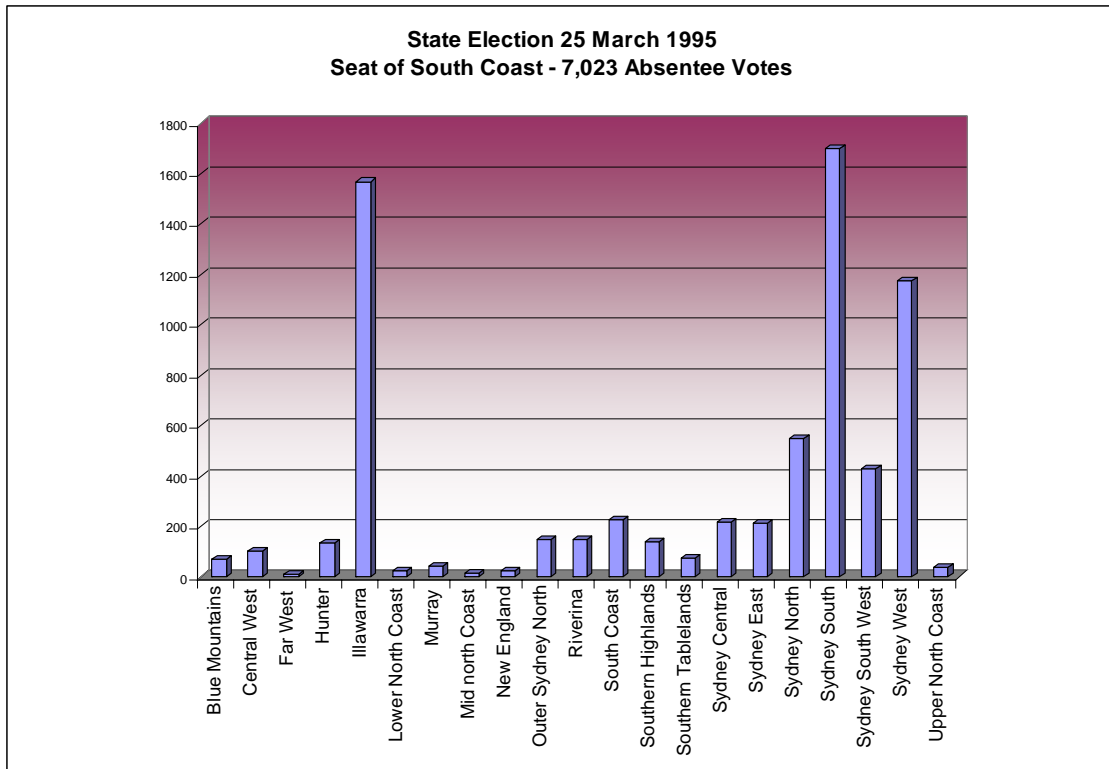
Origin of our Visitors

The following is a novel way of determining the origin of our visitors. The Figures have been collected by the Federal or State Electoral offices and supplied as raw data. The analyses have been done by the Tourism Office of Shoalhaven City Council.

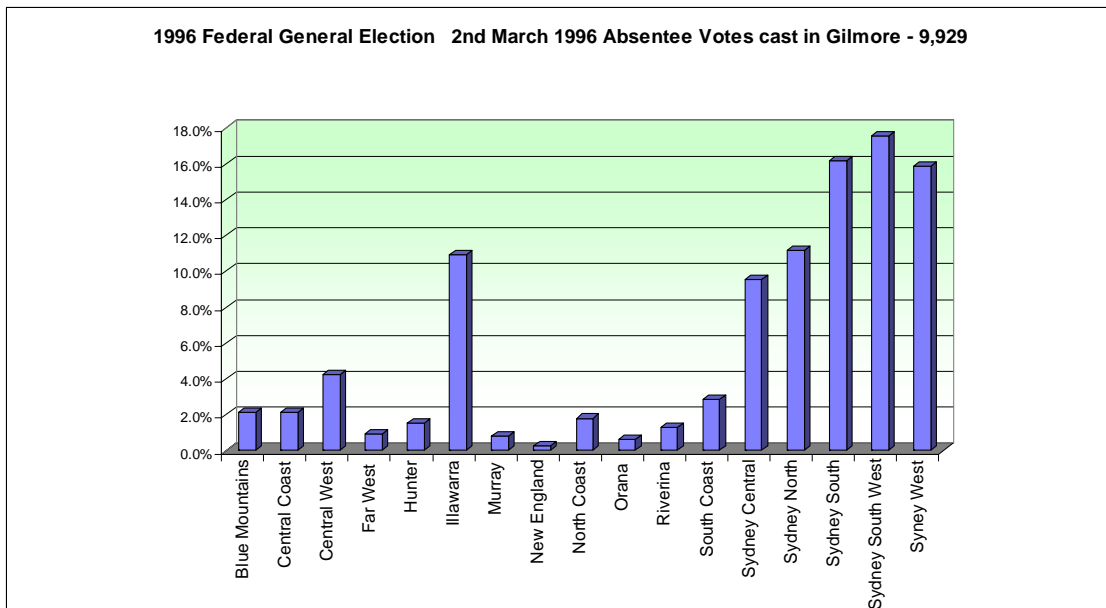
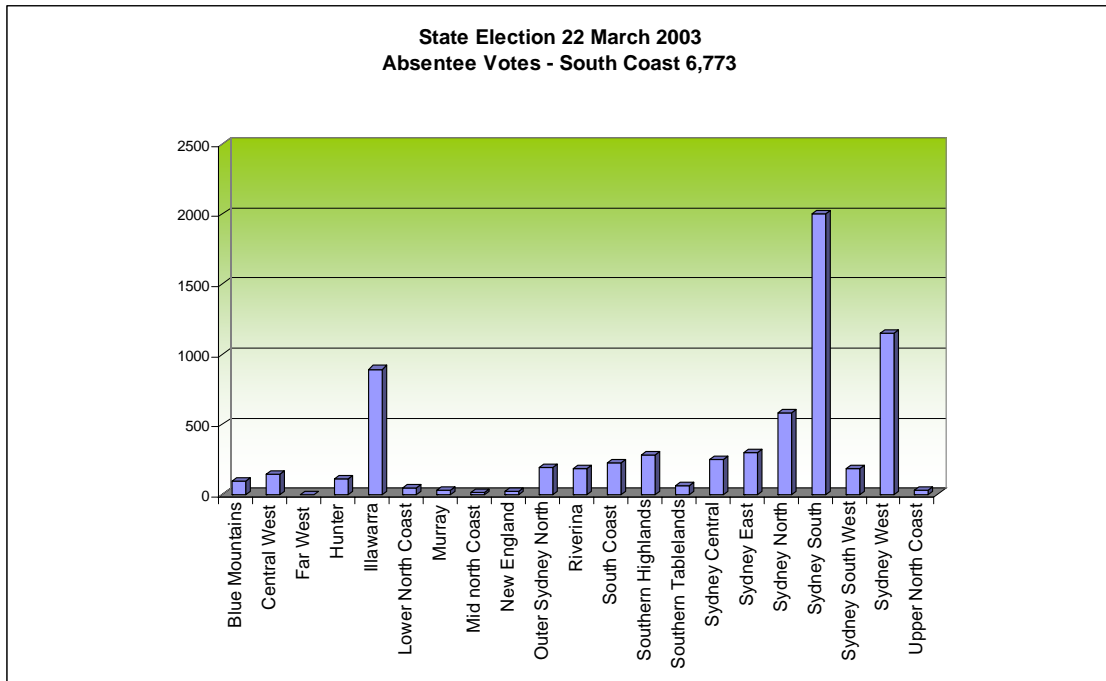
Over the years, there have been NSW and Federal General Elections. Usually on those particular weekends there were no special events in the Shoalhaven to attract visitors and the normal pattern of events is for people to stay within their own electorate. Despite this, people do visit the Shoalhaven and record absentee votes in the South Coast electorate or the Gilmore Electorate. The number of votes in each case has been analysed by electorate and by Statistical Tourism Regions.



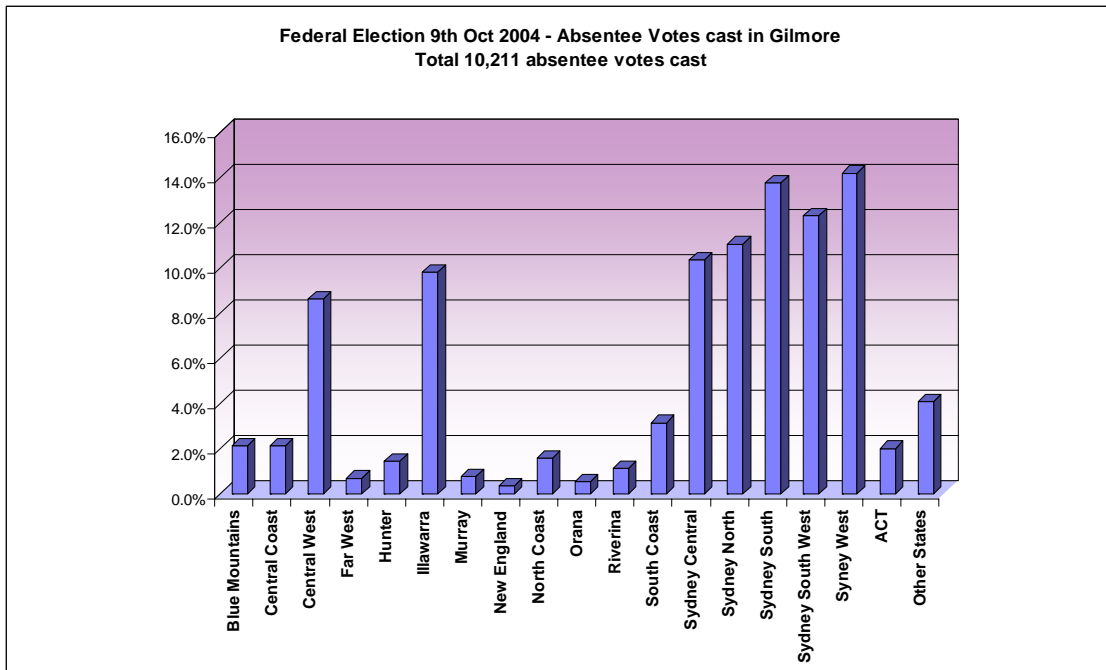
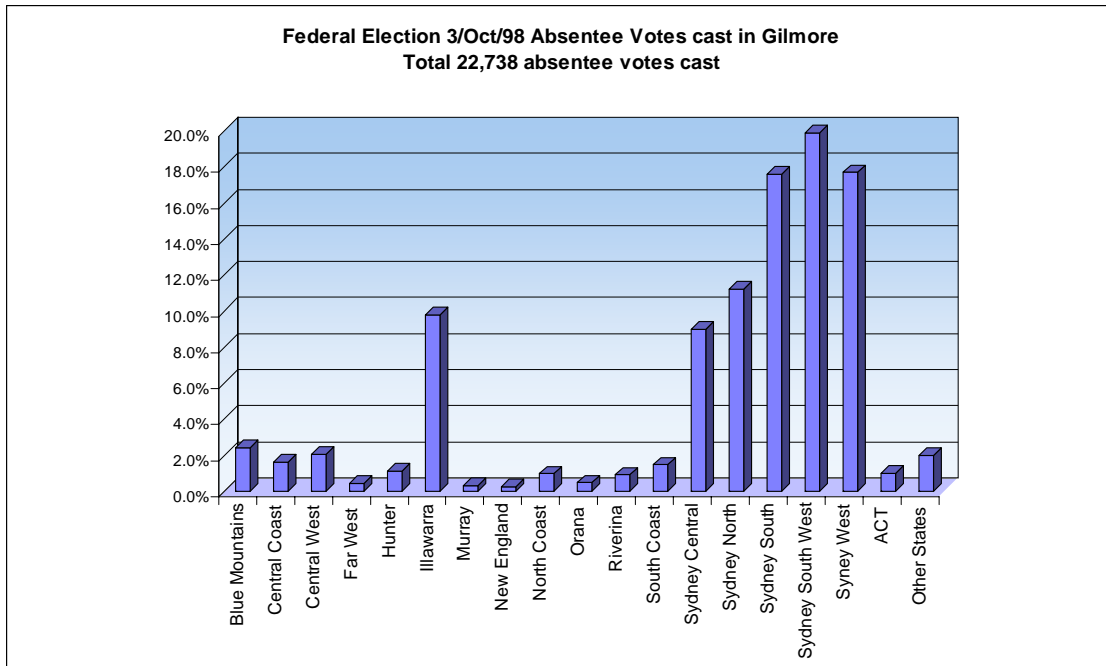
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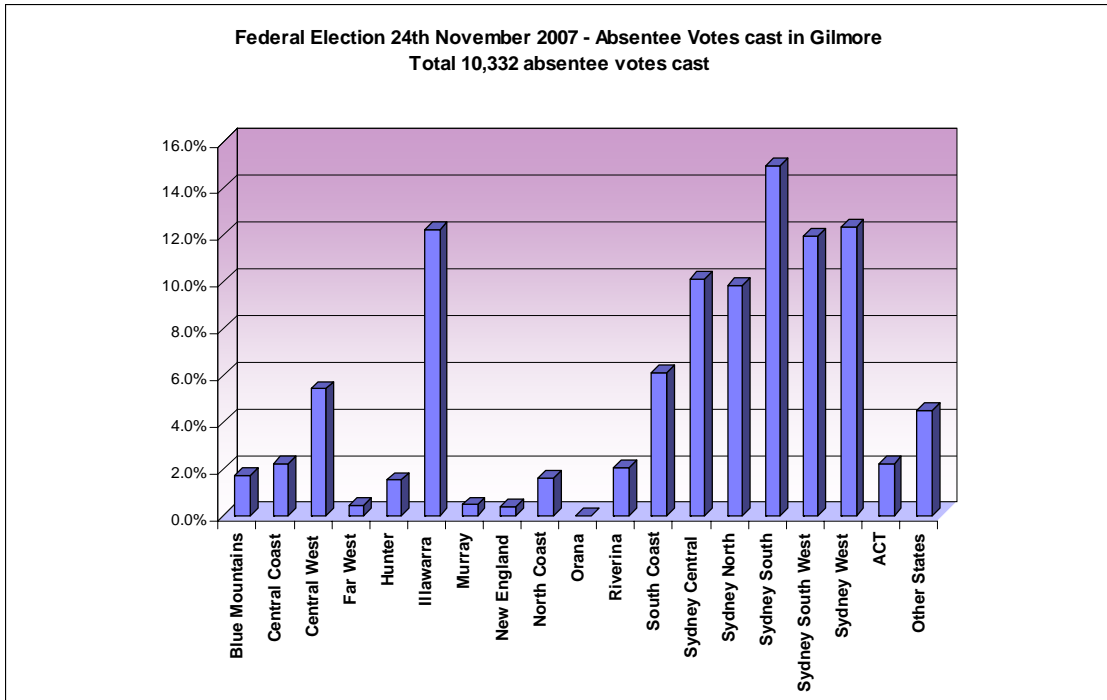
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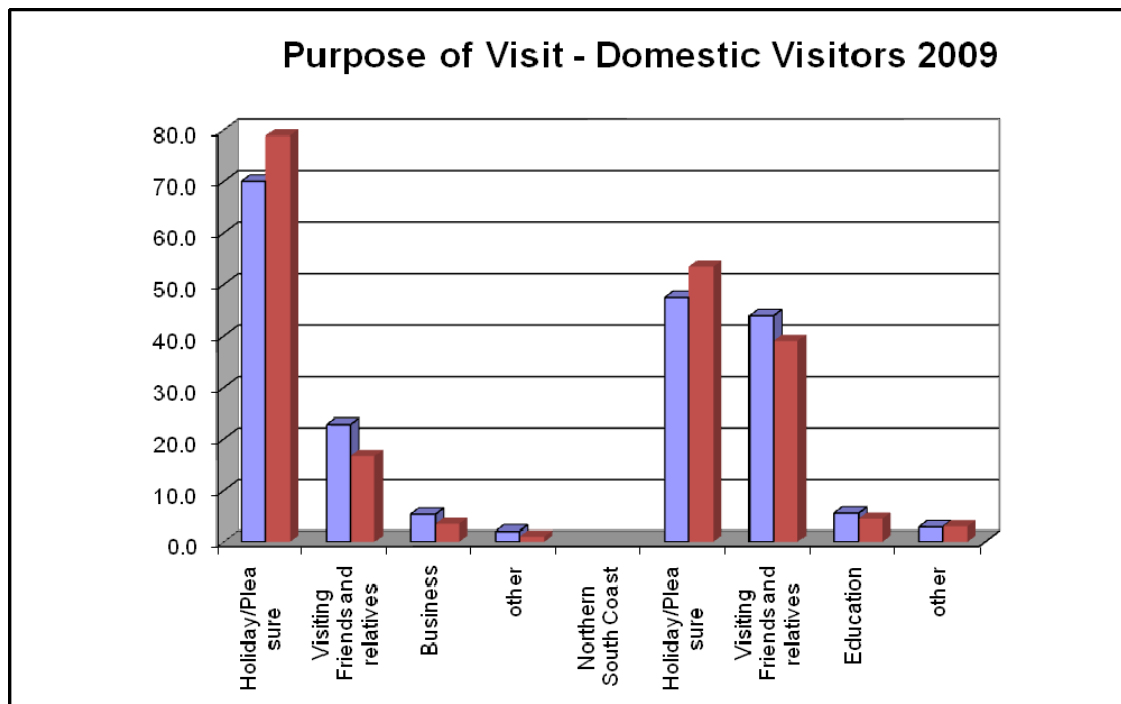
South Coast Tourism Profile

The South Coast of New South Wales is made up of the three Local government Areas of Shoalhaven City, Eurobodalla Shire and Bega Valley Shire. Geographically it stretches from Berry and Kangaroo Valley in the North to Eden in the South.

The following is extracted from the South Coast Region and Illawarra Region Tourism Profile, year ending December 2009. Prepared by Tourism New South Wales from figures supplied by Tourism Research Australia. The full documents are available.

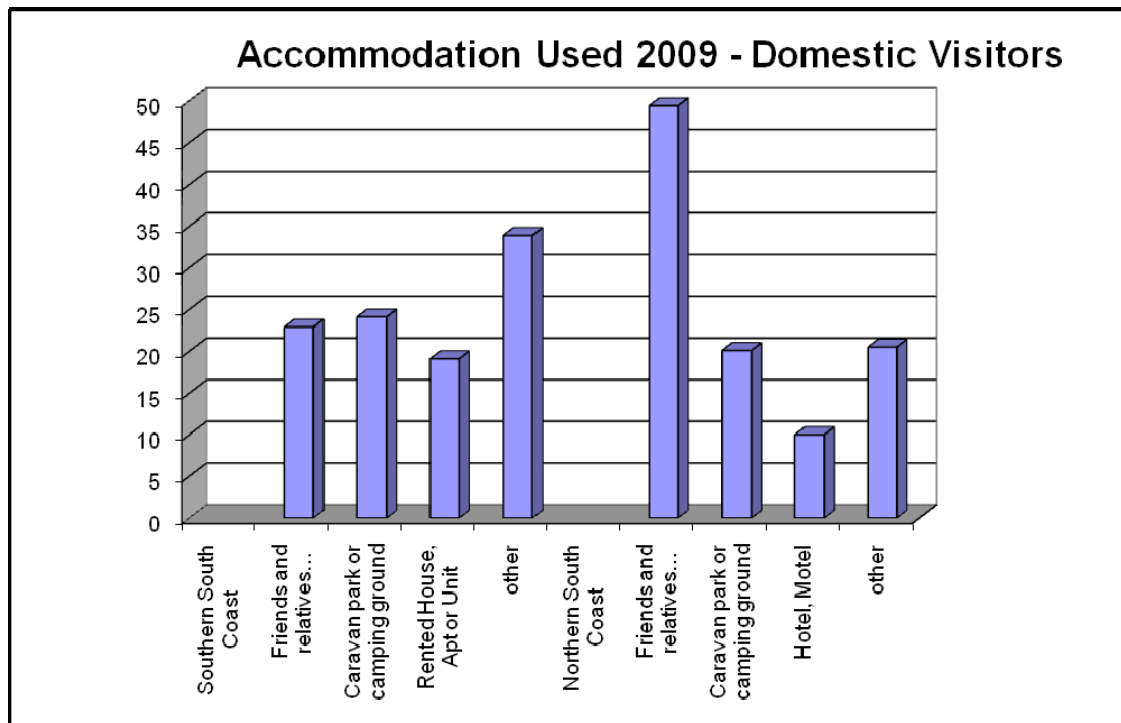
For What Purpose Do Domestic Visitors Travel To The South Coast Region?

Purpose of Visit - Visitors 2009		Visitor
Southern South Coast	Visitors	Nights
Holiday/Pleasure	70.0	78.9
Visiting Friends and relatives	22.8	16.6
Business	5.3	3.4
other	2.0	1.0
Northern South Coast		
Holiday/Pleasure	47.4	53.5
Visiting Friends and relatives	44.0	39.0
Education	5.5	4.4
other	2.8	2.9



What Accommodation Do Domestic Visitors Use In The South Coast Region?

Accommodation Used 2009	%
Southern South Coast	
Friends and relatives property	22.9
Caravan park or camping ground	24.1
Rented House, Apt or Unit	19.1
other	33.9
Northern South Coast	
Friends and relatives property	49.4
Caravan park or camping ground	20.1
Hotel, Motel	10.0
other	20.5



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2009.

How long do domestic visitors stay in the South Coast Region?

During 200 the average length of stay was 3.5 nights.

Source: Tourism Research Australia, National Visitor Survey, YE Dec 2009

	Domestic	international
Shoalhaven and JBT	3.2 nights	5.5 nights
South Coast (incl Educational		

Source: Tourism Research Australia, National Visitor Survey, YE Dec 2009
Shoalhaven City Council

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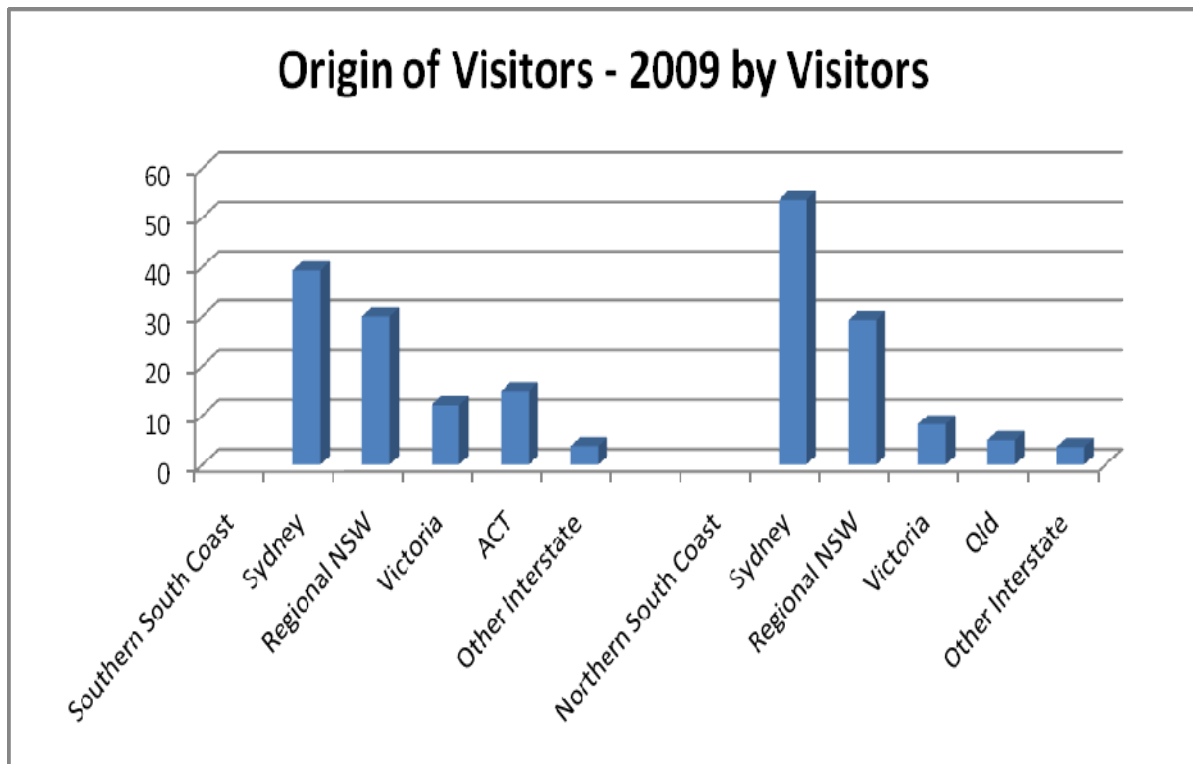
Within Wollongong City)

3.5 nights

16.4 nights

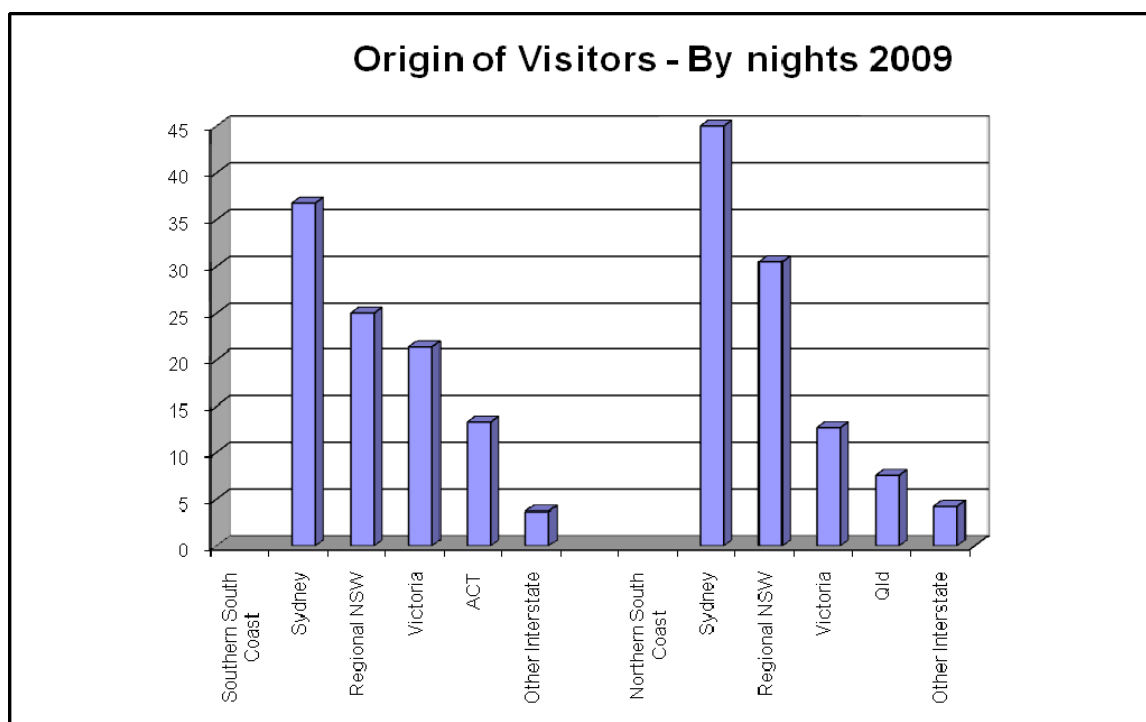
From where Do Our Visitors Come?

Where do our Visitors come from	
Origin of Visitors - 2009 by Visitors	%
Southern South Coast	
Sydney	39.3
Regional NSW	30.0
Victoria	12.1
ACT	14.8
Other Interstate	3.8
Northern South Coast	
Sydney	53.6
Regional NSW	29.3
Victoria	8.2
Qld	5.0
Other Interstate	3.6



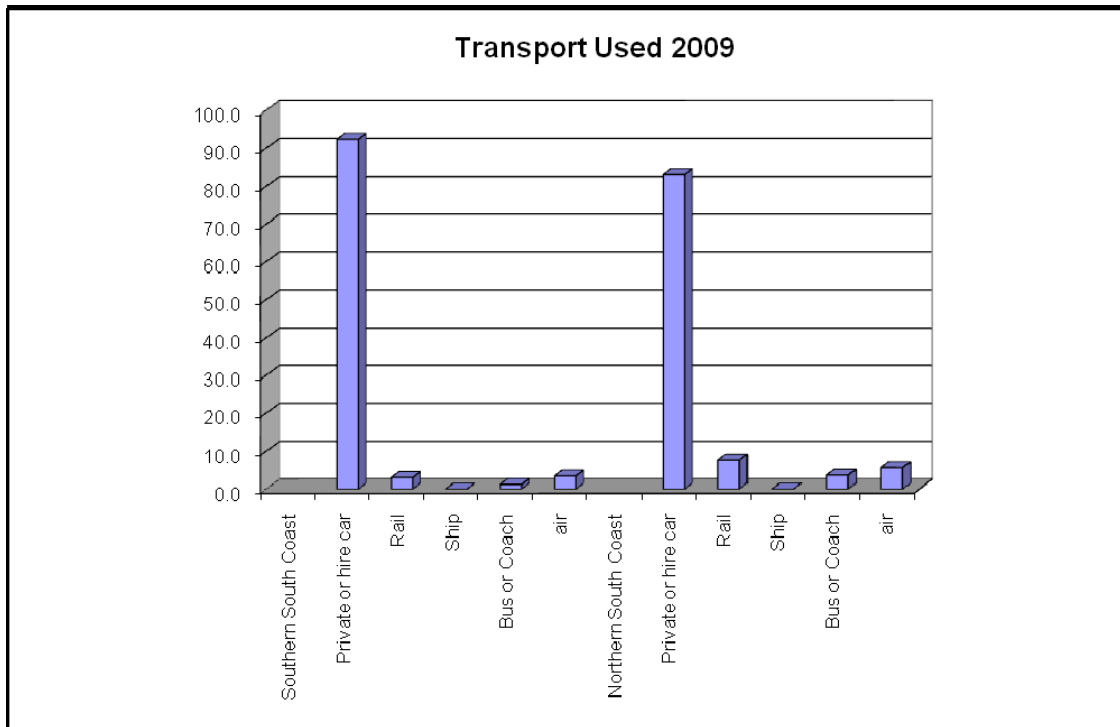
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Origin of Visitors - 2009 by Nights	%
Southern South Coast	
Sydney	36.8
Regional NSW	25.0
Victoria	21.3
ACT	13.3
Other Interstate	3.7
Northern South Coast	
Sydney	45.0
Regional NSW	30.5
Victoria	12.7
Qld	7.6
Other Interstate	4.2



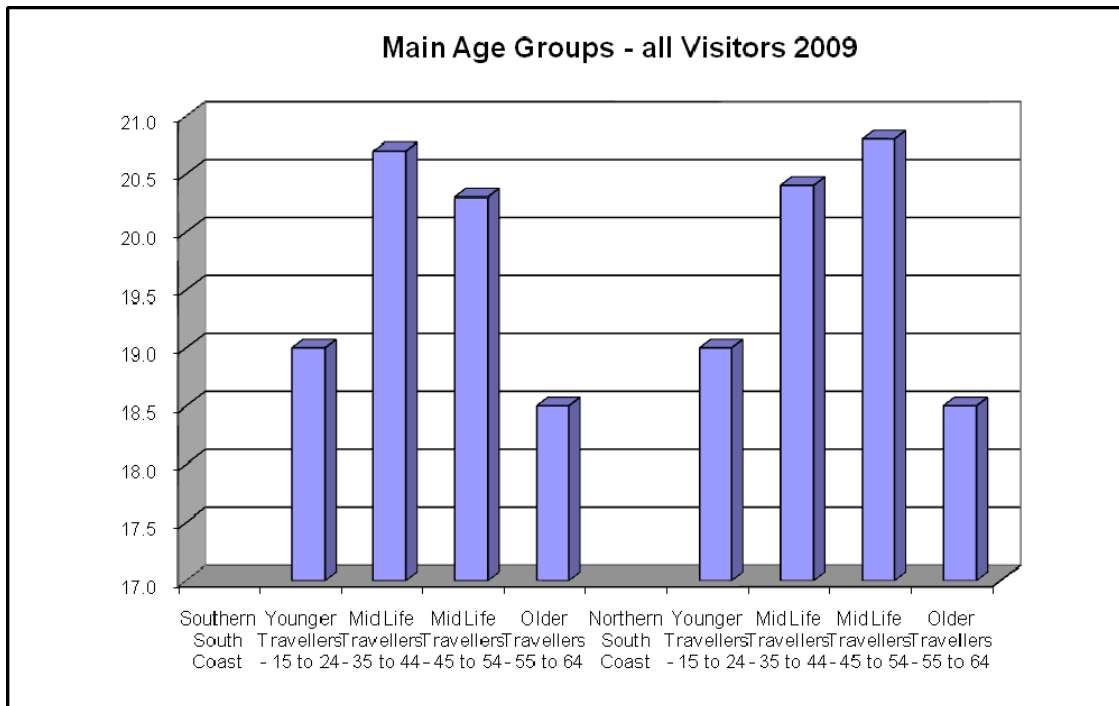
What Transport Do Our Visitors Use?

What Transport Do Our Visitors Use?	
	%
Transport Used 2009	
Southern South Coast	
Private or hire car	92.4
Rail	3.0
Ship	0.0
Bus or Coach	1.2
air	3.4
Northern South Coast	
Private or hire car	83.2
Rail	7.6
Ship	0.0
Bus or Coach	3.6
air	5.6



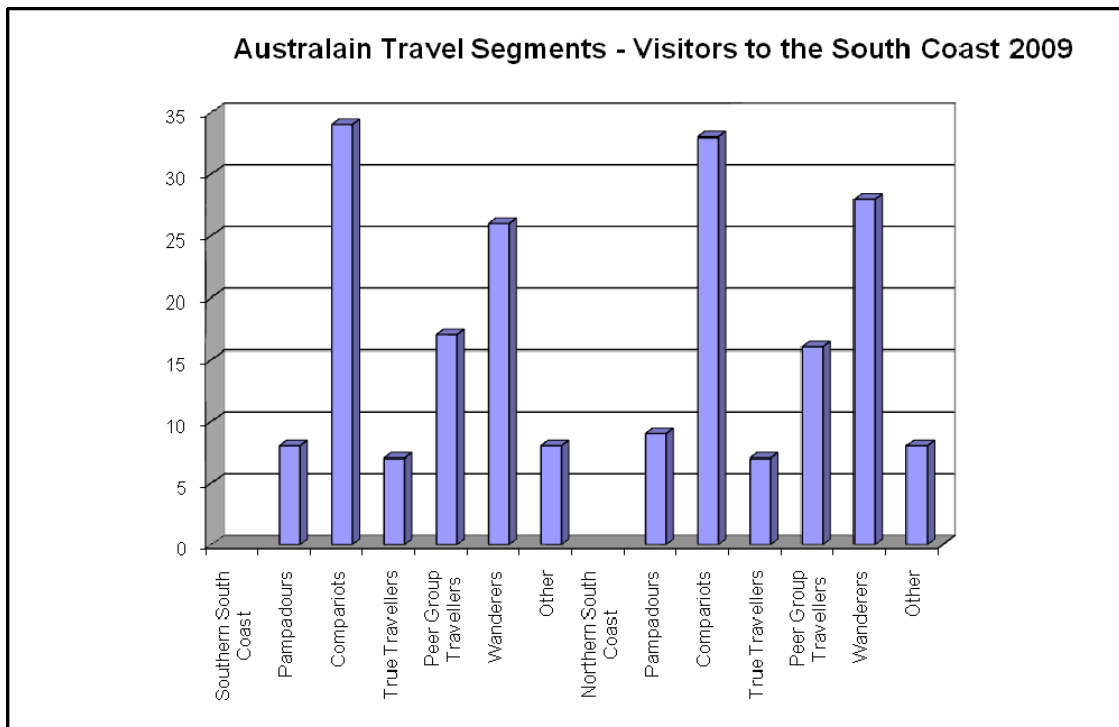
What Are The Age And Sex Of Domestic Visitors To The South Coast Region?

	%
Main Age Groups - all visitors 2009	
Southern South Coast	
Younger Travellers - 15 to 24	19.0
Mid Life Travellers - 35 to 44	20.7
Mid Life Travellers - 45 to 54	20.3
Older Travellers - 55 to 64	18.5
Northern South Coast	
Younger Travellers - 15 to 24	19.0
Mid Life Travellers - 35 to 44	20.4
Mid Life Travellers - 45 to 54	20.8
Older Travellers - 55 to 64	18.5



Travel Segments / Demographics

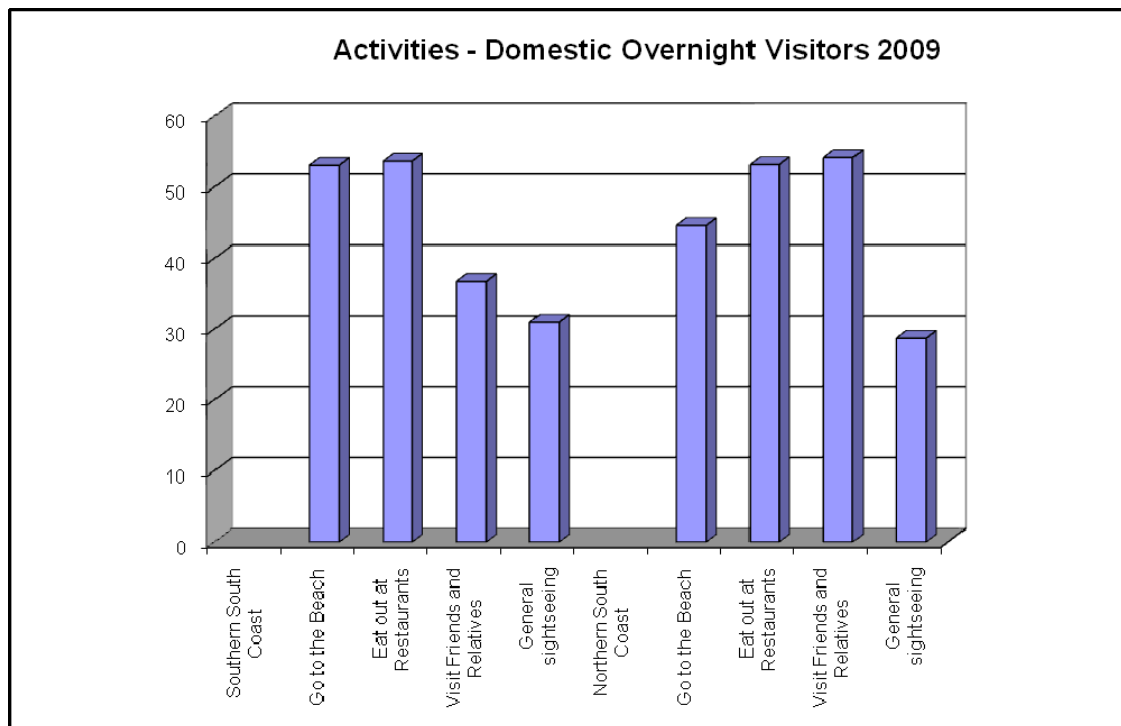
Australian Travel Segments – Visitors to the South Coast	
2009	%
Southern South Coast	
Pampadours	8.0
Companiots	34.0
True Travellers	7.0
Peer Group Travellers	17.0
Wanderers	26.0
Other	8.0
Northern South Coast	
Pampadours	9.0
Companiots	33.0
True Travellers	7.0
Peer Group Travellers	16.0
Wanderers	28.0
Other	8.0



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Preferred Activities of Visitors – South Coast 2009

Activities - overnight visitors 2009	%
Southern South Coast	
Go to the Beach	53.1
Eat out at Restaurants	53.7
Visit Friends and Relatives	36.7
General sightseeing	31.0
Northern South Coast	
Go to the Beach	44.6
Eat out at Restaurants	53.2
Visit Friends and Relatives	54.2
General sightseeing	28.7



Day Visitors

Having defined our "measuring stick" as visitor nights, there is still a need to identify day visitors (people who do not stay overnight) and the place from which they come. This need is twofold. Firstly these people can add valuable support (ie, spend money) at special events and functions in the Shoalhaven and secondly they represent a potential to be converted into visitor nights hence securing a higher expenditure per head

Preferred Activities of Day Visitors - 2009

Top Activities - Day Visitors 2009	%
Southern South Coast	
Eat out at restaurants	41.3
Visit friends and relatives	24.8
Go Shopping (pleasure)	25.1
Go to the beach	19.1
General sight seeing	23.4
Northern South Coast	
Eat out at restaurants	45.4
Visit friends and relatives	29.8
Go Shopping (pleasure)	14.9
Go to the beach	27.0
General sight seeing	24.8



Purpose Of Visit – Day Visitors

Purpose of Visit - Day Visitors 2009	%
Southern South Coast	
Holiday or Leisure	61.4
Visit friends and relatives	18.9
Business	9.1
Other	10.6
Northern South Coast	
Holiday or Leisure	60.8
Visit friends and relatives	24.6
Business	8.3
Other	6.3



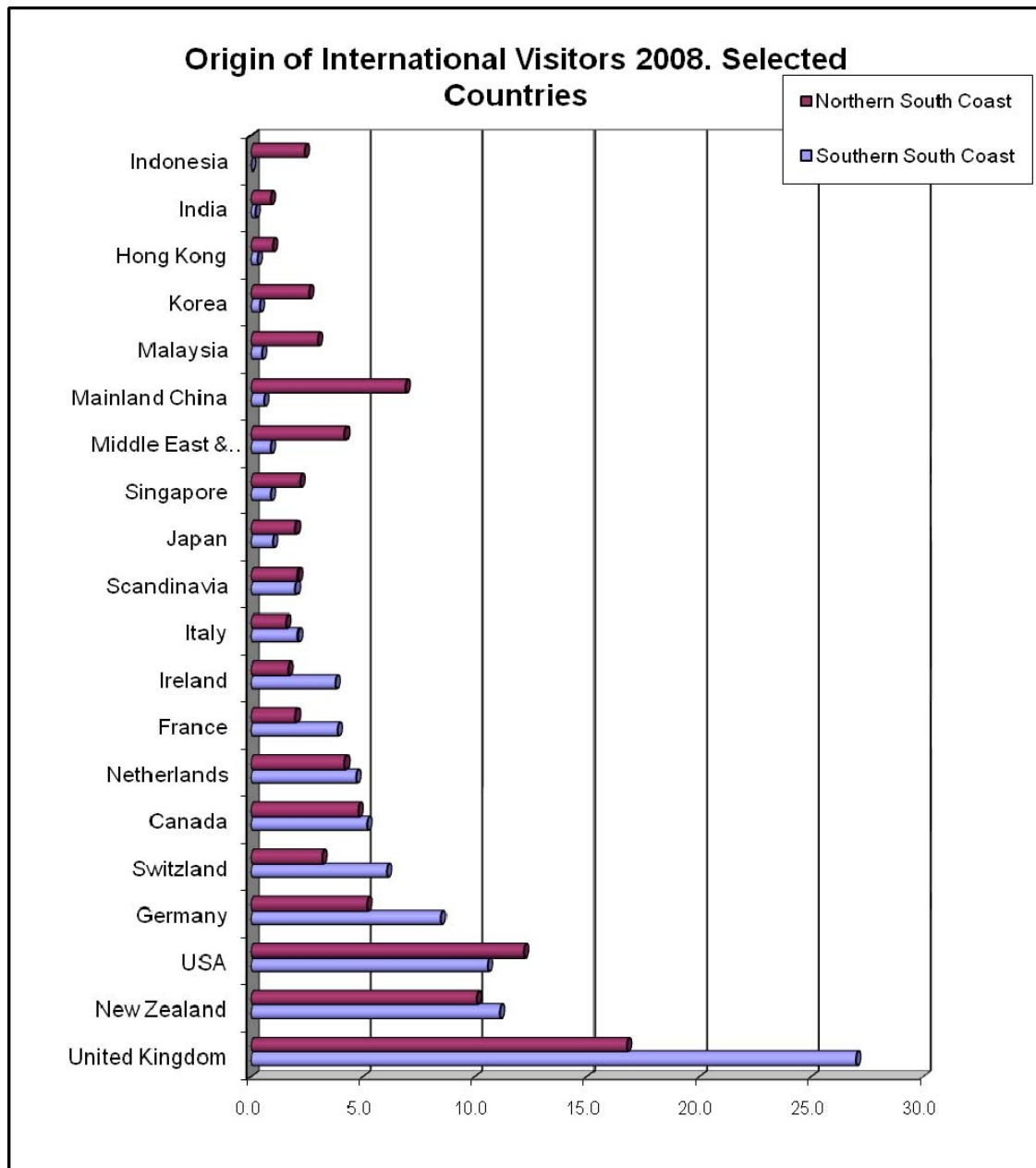
International Visitors to the South Coast Region

Origin of International Visitors to the South Coast Region

Origin of International Visitors 2009	Southern South Coast	Northern South Coast
United Kingdom	27.0	16.8
New Zealand	11.1	10.1
USA	10.6	12.2
Germany	8.5	5.2
Switzerland	6.1	3.2
Canada	5.2	4.8
Netherlands	4.7	4.2
France	3.9	2.0
Ireland	3.8	1.7
Italy	2.1	1.6
Scandinavia	2.0	2.1
Japan	1.0	2.0
Singapore	0.9	2.2
Middle East & N Africa	0.9	4.2
Mainland China	0.6	6.9
Malaysia	0.5	3.0
Korea	0.4	2.6
Hong Kong	0.3	1.0
India	0.2	0.9
Indonesia	0.0	2.4

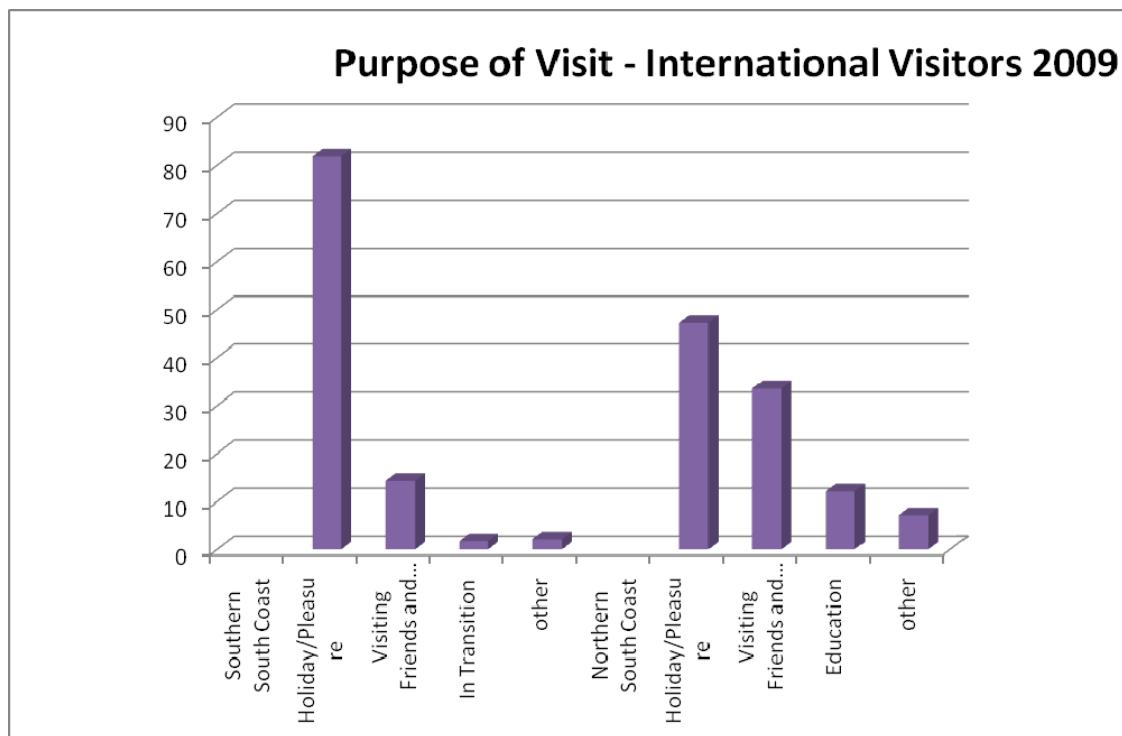
Total International Visitors

- South Coast Region (total)
106,000 Visitors staying 1,736,000 nights giving an average of 16.4
- Northern South Coast (Illawarra) – 62,000 Visitors. 1,433,000 Visitor Nights. Note this includes visitation for educational visits (mainly to Wollongong University. Average length of stay – 23 nights)
- Southern South Coast – 65,000 Visitors. Unreliable data for Visitor Nights



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Purpose of Visit of International	2009
Visitors to the South Coast	%
Southern South Coast	
Holiday/Pleasure	81.9
Visiting Friends and relatives	14.3
In Transition	1.7
other	2.1
Northern South Coast	
Holiday/Pleasure	47.2
Visiting Friends and relatives	33.5
Education	12.1
other	7.2



*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2009*

Accommodation Used - International Visitors 2009	
	%
Southern South Coast	
Home of a Friend or Relative	43.4
Hotel, Motel	11.8
Caravan Park	13.6
Other Incl rented house or unit	31.2
Northern South Coast	
Home of a Friend or Relative	24.2
Educational Institution	15.2
Rented house, apartment, unit	40.7
Other incl Caravan Park	19.9

