

ISSN 1035-144

SHOALHAVEN CITY COUNCIL

TOURISM IN THE SHOALHAVEN



**PROFILE AND STATEMENT
OF ECONOMIC IMPACT
For the year ending 31 December 2008**

14th April 2009

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 102,600 by 2011 and 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 2008.

They include Shoalhaven City Local Government Area and Jervis Bay Territory

Year Ending December 2008	Shoalhaven (Incl. JBT)
Number of Domestic Overnight Visitors	1,294,000
Number of Domestic Visitor Nights	4,129,000
Number of Domestic Day Visitors	1,391,000
Expenditure-Domestic Overnight visitors	\$474,835,000
Expenditure by Day Visitors	\$140,491,000
International Visitors	
Number of Visitors	29,000
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	\$2,000,000
Totals	<u>\$629,326,000</u>
Total Expenditure by all Visitors	\$629,000,000

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 2008. If figures for 2008 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 2006

Travel Expenditure by Visitors
Tourism Research Australia
Year Ended 31 Dec 2008
South Coast Domestic - \$115 per night
South Coast Domestic - \$101 per day
Regional NSW Domestic - \$121 per night
Regional NSW Domestic - \$112 per day
South Coast International \$78 per night in the region
South Coast International - \$101 per day (assumed same as domestic)
NSW International \$69 per night in the region
NSW International - \$101 per day (assumed same as domestic)

Year Ending December 2008	Shoalhaven (Incl. JBT)	South Coast	NSW
Number of Domestic Overnight Visitors	1,294,000	3,219,000	24,100,000
Number of Domestic Visitor Nights	4,129,000	11,363,000	81,600,000
Number of Domestic Day Visitors	1,391,000	4,876,000	44,300,000
Expenditure-Domestic Overnight visitors	\$474,835,000	\$1,300,000,000	\$12,500,000,000
Expenditure by Day Visitors	\$140,491,000	\$492,000,000	\$4,800,000,000
International Visitors			
Number of Visitors	29,000	113,000	2,800,000
Number of Visitor Nights - unreliable data	160,000	3,390,000	58,000,000
Number of Day visitors - unreliable data	20,000	160,000	
Expenditure by International Overnight Visitors	\$12,000,000	\$264,000,000	\$5,600,000,000
Expenditure by International Day Visitors	\$2,000,000	\$16,000,000	
Total Expenditure by all Visitors	\$629,000,000	\$2,072,000,000	\$23,000,000,000

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



Washerwomans Beach, Bendalong.

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 2008*

Local Government Visitation 2007						
Domestic Visitors			Domestic Visitor Nights			
rank	2007	2007 Overnight Visitors '000	rank	2007	2007 Visitor Nights '000	
	Sydney	7,357		Sydney	21,882	
1	Shoalhaven (incl JBT)	1,111	1	Shoalhaven (incl JBT)	3,697	
2	Newcastle	936	2	Hastings (PM)	2,955	
3	Coffs Harbour	766	3	Port Stephens (A)	2,824	
4	Port Stephens (A)	725	4	Newcastle	2,617	
5	Hastings (PM)	718	5	Coffs Harbour	2,555	
6	Gosford (C)	642	6	Eurobodalla (A)	2,295	
7	Wollongong (C)	613	7	Great Lakes (A)	1,935	
8	Eurobodalla (A)	606	8	Byron Shire	1,927	
9	Great Lakes	543	9	Bega Valley	1,910	
10	Blue Mountains	504	10	Gosford	1,881	
11	Byron (A)	500	11	Snowy River	1,680	
12	Clarence Valley	439	12	Clarence Valley	1,562	
13	Albury (C)	438	13	Wollongong	1,461	
14	Wyong	437	14	Kempsey	1,451	
15	Tamworth	432	15	Wyong	1,351	
16	Dubbo	428	16	Tweed	1,338	
17	Bega Valley	424	17	Tamworth	1,288	

Local Government Visitation 2008					
Domestic Visitors			Domestic Visitor Nights		
	Overnight Visitors	'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
	Increase	16.47%		Increase	11.69%
2008	South Coast	3,219	2008	South Coast	11,363
	Percentage of South Coast				
	Shoalhaven (incl JBT)	40.20%		Shoalhaven (incl JBT)	36.34%
Tourism Income (\$million)					
2008	Shoalhaven (incl JBT)	629			
2008	South Coast	2,004			
	Percentage of South Coast				
	Shoalhaven (incl JBT)	31.38%			

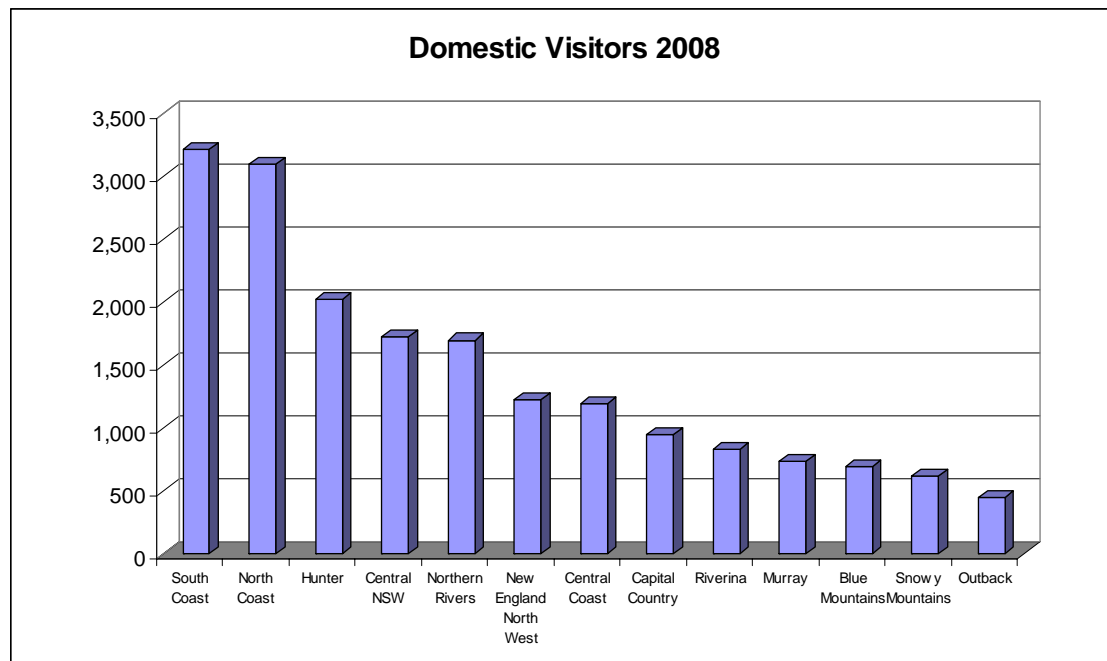
South Coast Comparisons with other Regions

	YE Dec 2008	Visitors (,000)	Visitor Nights (,000)	Day Visitors (,000)	Int'l Visitors (,000)	Int'l Nights (,000)	Tourism expend \$m
	NSW	24,100	81,600	44,300	2,800	58,100	22,900
	Lord Howe Island	n/a	617	n/a	n/a	n/a	170
1	Sydney	7,600	20,900	15,500	2,600	48,900	11,200
2	South Coast	3,219	11,363	4,876	96	n/a	2,004
3	North Coast	3,100	11,700	3,109	159	882	2,008
4	Hunter	2,026	5,476	4,148	113	1,615	1,292
5	Central NSW	1,723	4,841	2,222	34	n/a	940
6	Northern Rivers	1,697	6,897	3,216	223	1,725	1,335
7	New England North West	1,221	3,717	1,744	41	n/a	606
8	Central Coast	1,193	3,575	3,017	31	n/a	765
9	Capital Country	944	2,318	1,957	22	n/a	458
10	Riverina	824	2,090	1,226	23	n/a	492
11	Murray	727	2,595	807	18	n/a	399
12	Blue Mountains	687	1,617	1,863	77	n/a	474
13	Snowy Mountains	618	2,305	369	19	n/a	542
14	Outback	443	1,589	179	13	n/a	215

Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008

Domestic Visitors - Regions in NSW

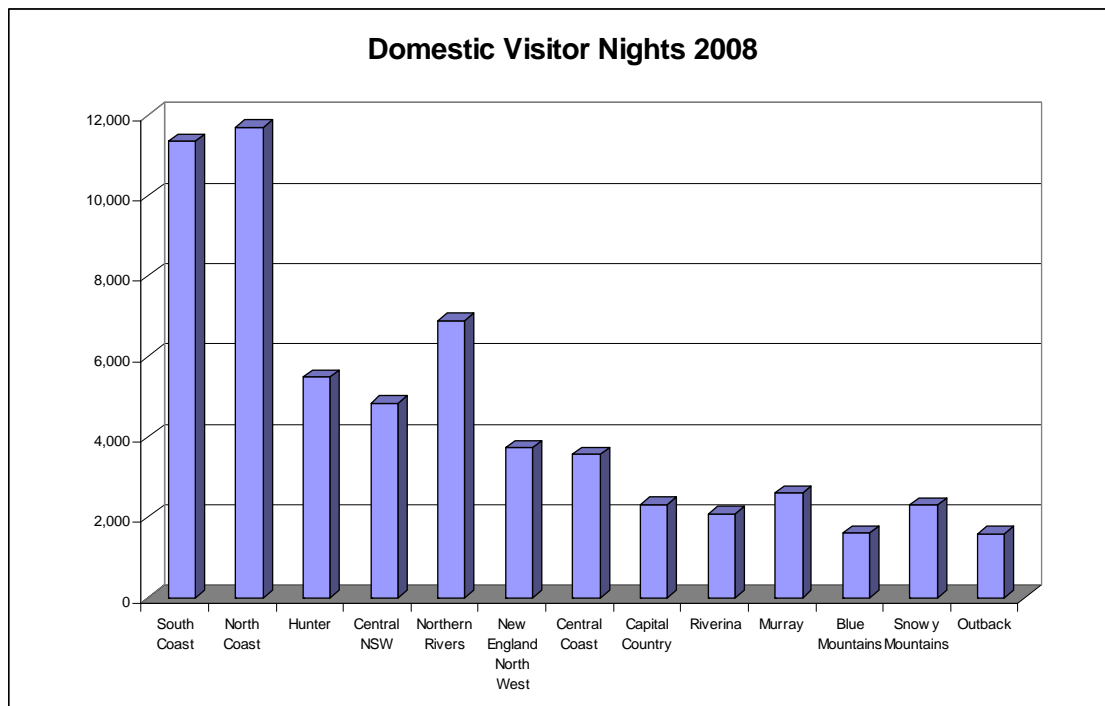
	Region for YE Dec 2008	Domestic Visitors '000
1	Sydney	7,600
2	South Coast	3,219
3	North Coast	3,100
4	Hunter	2,026
5	Central NSW	1,723
6	Northern Rivers	1,697
7	New England North West	1,221
8	Central Coast	1,193
9	Capital Country	944
10	Riverina	824
11	Murray	727
12	Blue Mountains	687
13	Snowy Mountains	618
14	Outback	443



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008

Domestic Visitor Nights - Regions in NSW

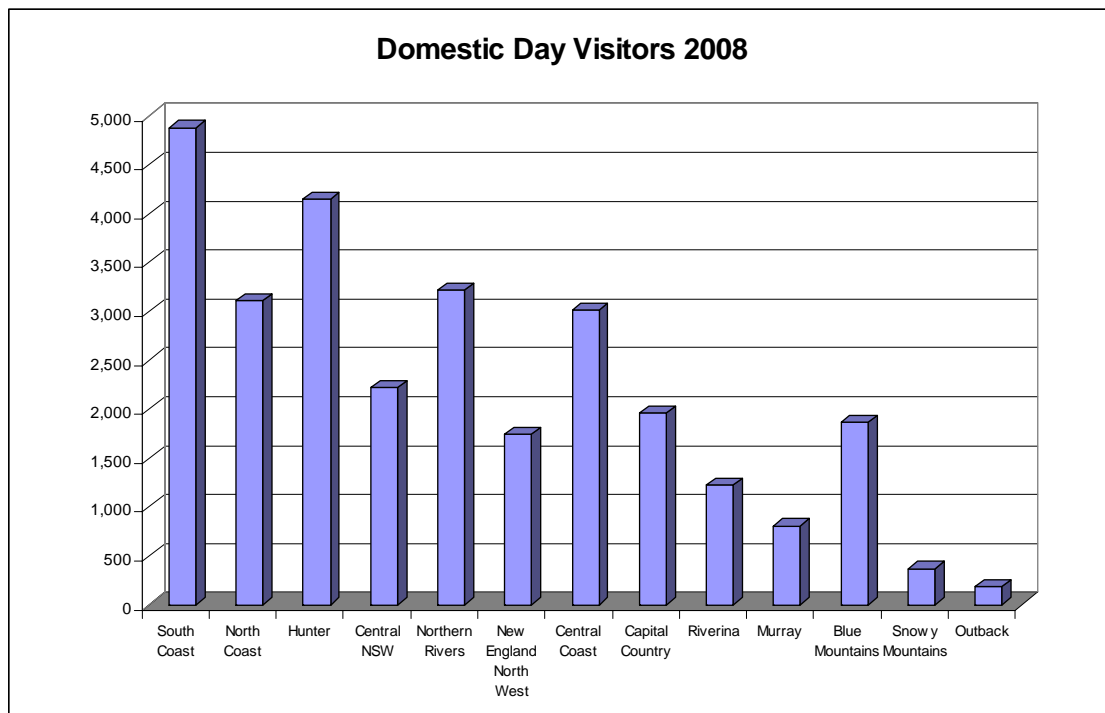
	Region	Visitor Nights '000
1	Sydney	20,900
2	South Coast	11,363
3	North Coast	11,700
4	Hunter	5,476
5	Central NSW	4,841
6	Northern Rivers	6,897
7	New England North West	3,717
8	Central Coast	3,575
9	Capital Country	2,318
10	Riverina	2,090
11	Murray	2,595
12	Blue Mountains	1,617
13	Snowy Mountains	2,305
14	Outback	1,589



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

Day Visitors - Regions in NSW

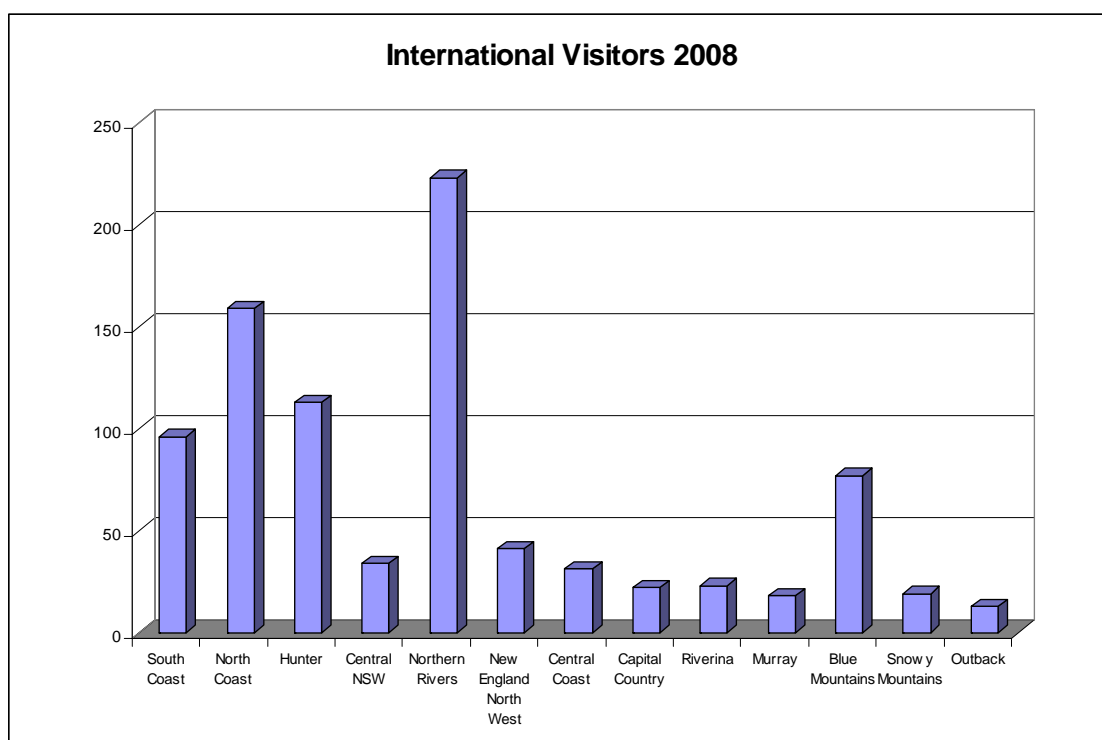
	Region YE Dec 2008	Day Visitors (,000)
1	Sydney	15,500
2	South Coast	4,876
3	North Coast	3,109
4	Hunter	4,148
5	Central NSW	2,222
6	Northern Rivers	3,216
7	New England North West	1,744
8	Central Coast	3,017
9	Capital Country	1,957
10	Riverina	1,226
11	Murray	807
12	Blue Mountains	1,863
13	Snowy Mountains	369
14	Outback	179



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

International Visitors - Regions in NSW

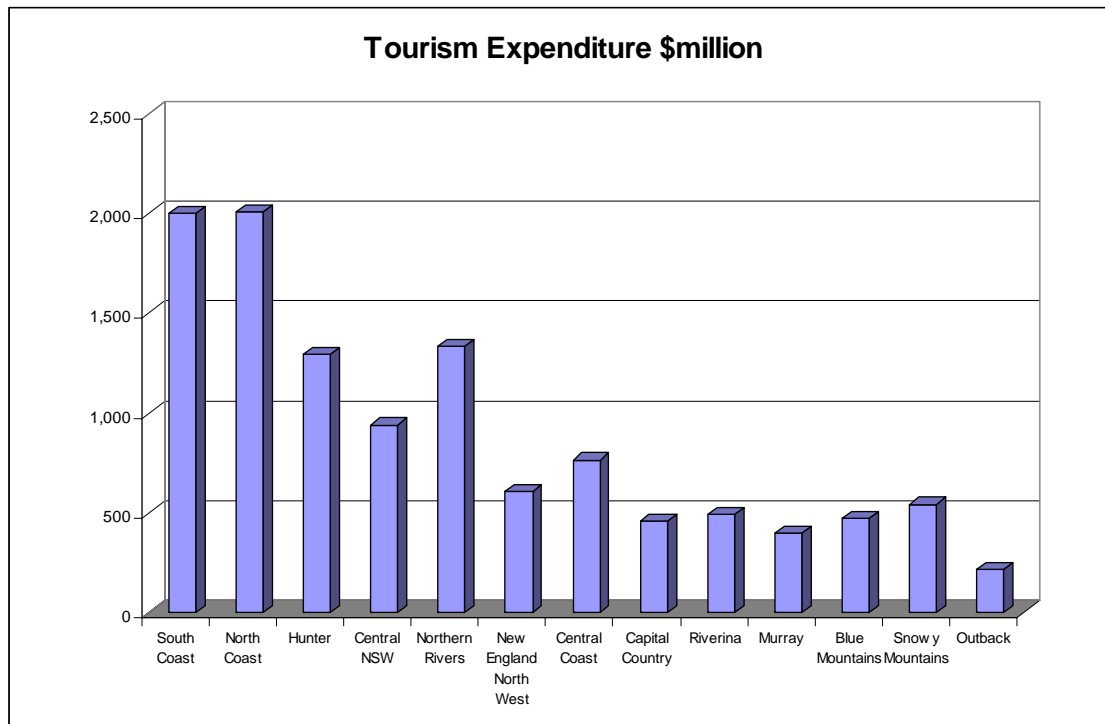
	Region YE Dec 2008	Int'l Visitors (,000)
1	Sydney	2,600
2	South Coast	96
3	North Coast	159
4	Hunter	113
5	Central NSW	34
6	Northern Rivers	223
7	New England North West	41
8	Central Coast	31
9	Capital Country	22
10	Riverina	23
11	Murray	18
12	Blue Mountains	77
13	Snowy Mountains	19
14	Outback	13



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

Tourism Income – Regions – 2008

	Region for YE Dec 2008	Tourism expend \$m
1	Sydney	11,200
2	South Coast	2,004
3	North Coast	2,008
4	Hunter	1,292
5	Central NSW	940
6	Northern Rivers	1,335
7	New England North West	606
8	Central Coast	765
9	Capital Country	458
10	Riverina	492
11	Murray	399
12	Blue Mountains	474
13	Snowy Mountains	542
14	Outback	215

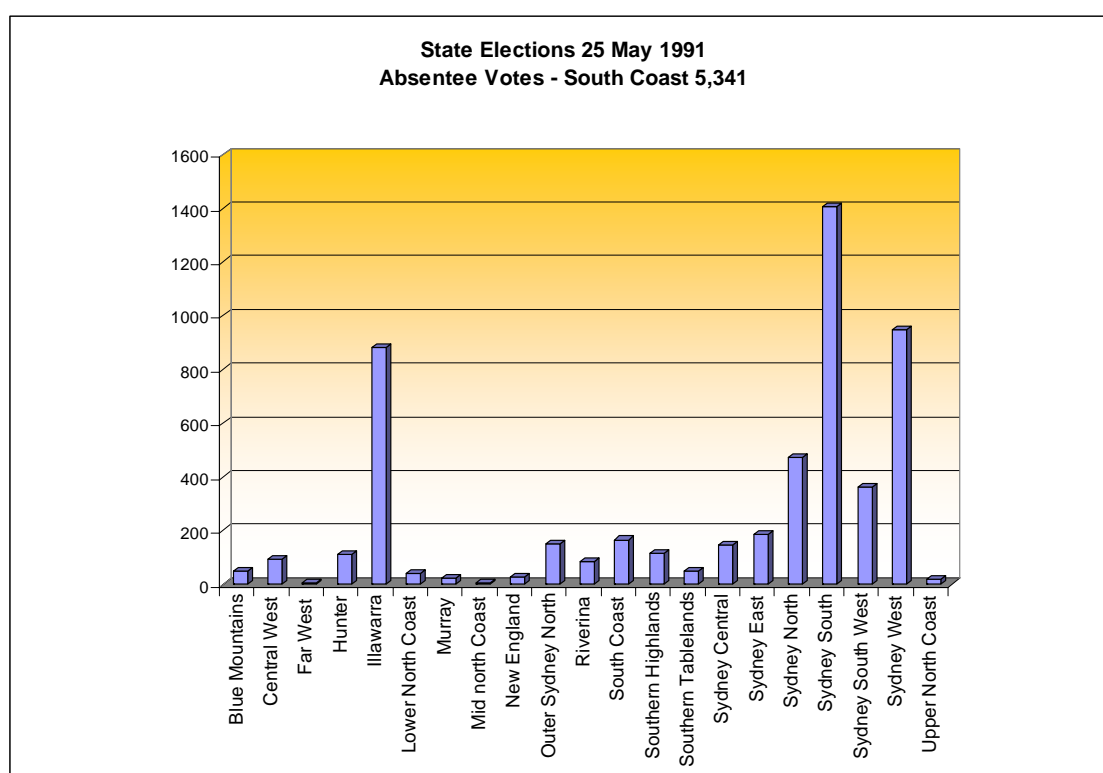


Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008

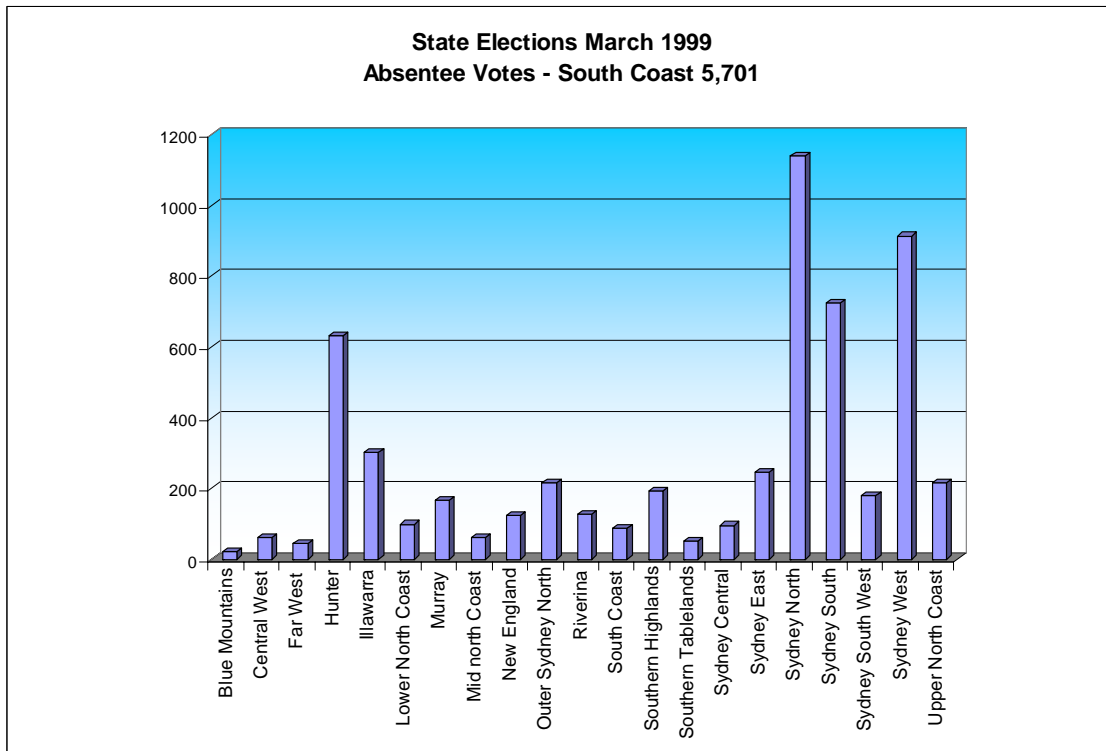
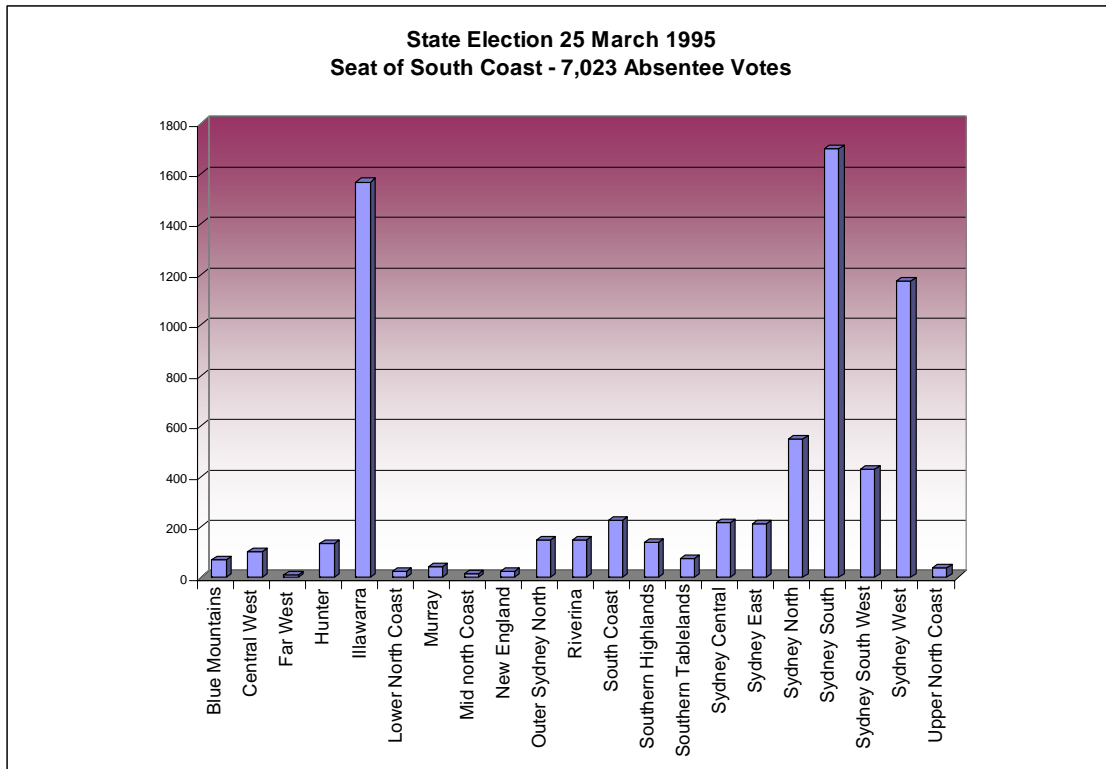
Origin of our Visitors

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.

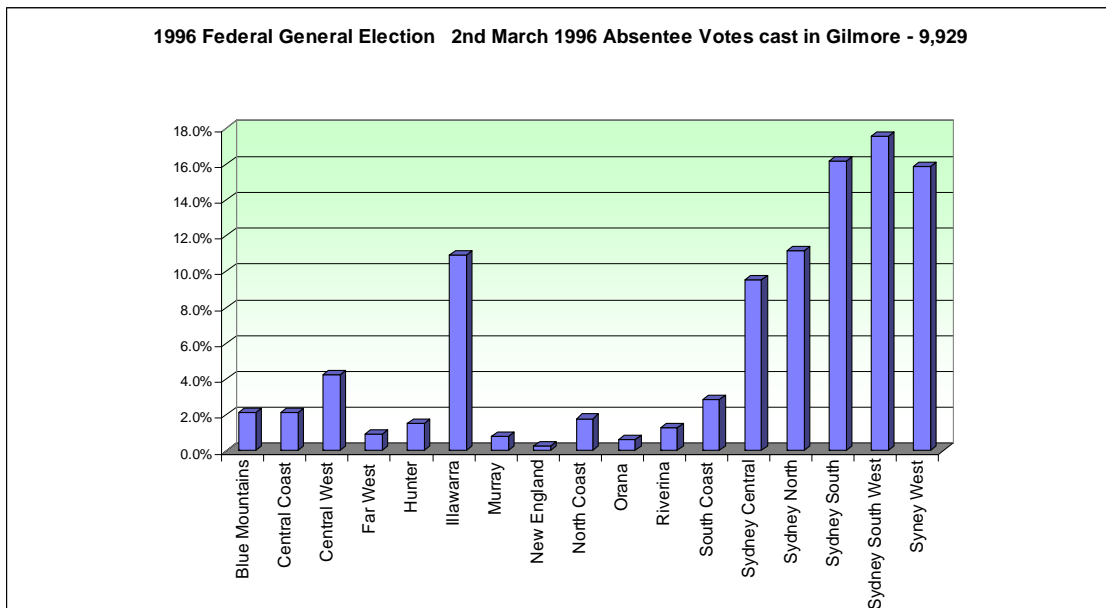
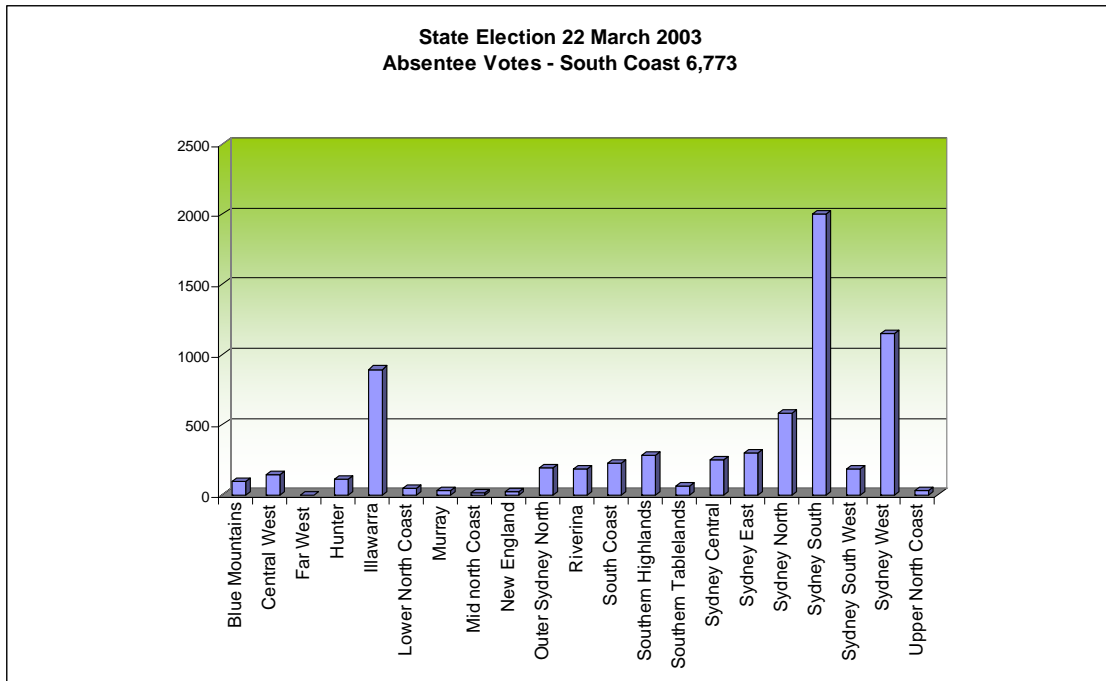
Over the years, there have been NSW and Federal General Elections. Usually on those particular weekends there were no special events in the Shoalhaven to attract visitors and the normal pattern of events is for people to stay within their own electorate. Despite this, people do visit the Shoalhaven and 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.



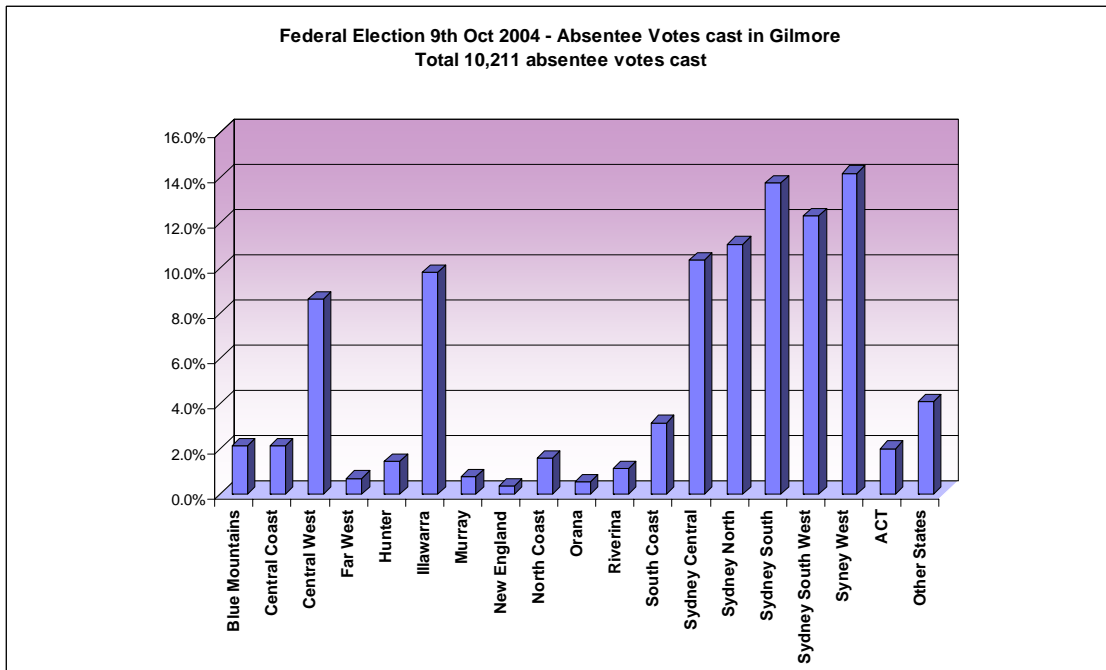
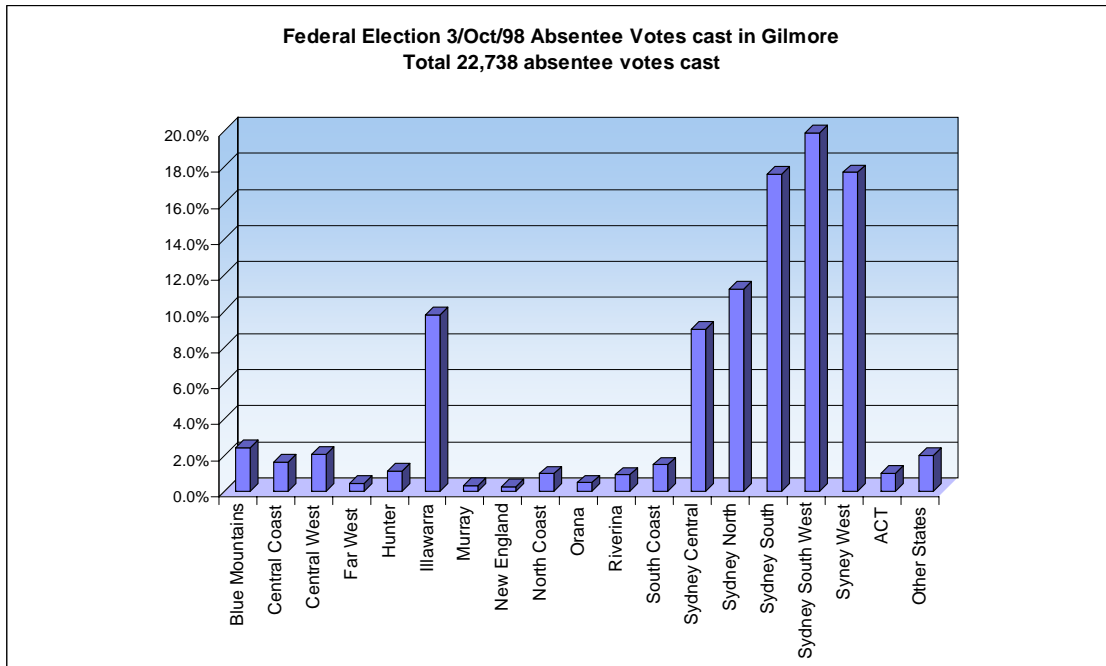
*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
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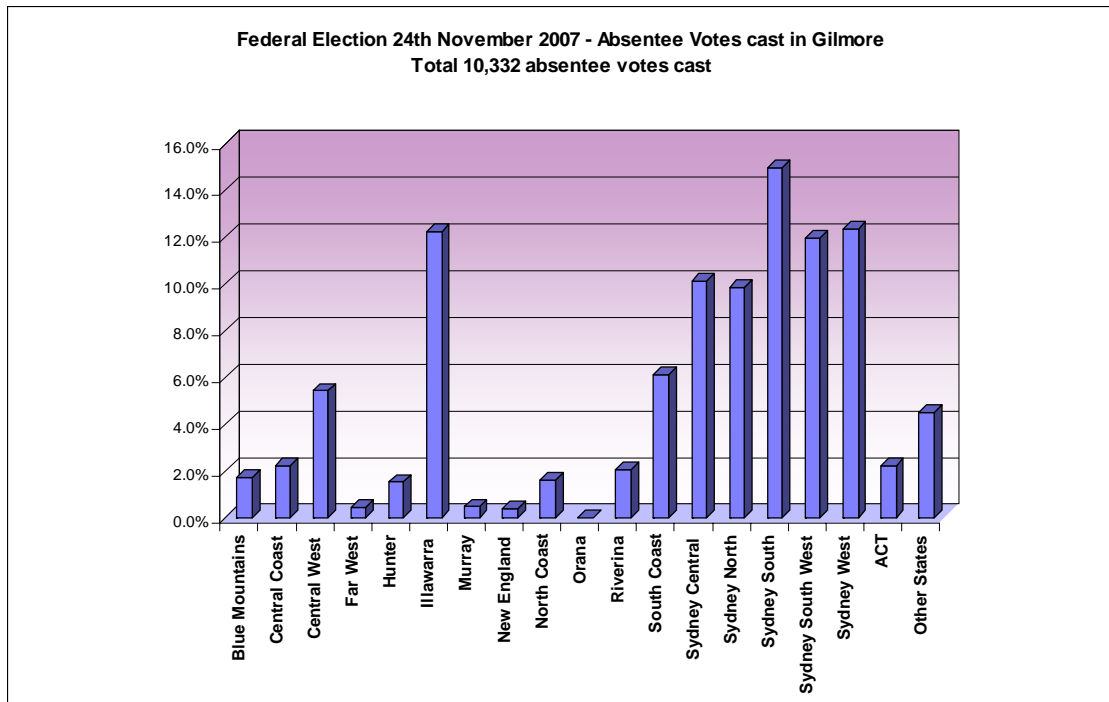
**Tourism in the Shoalhaven - Profile and Statement of Economic Impact
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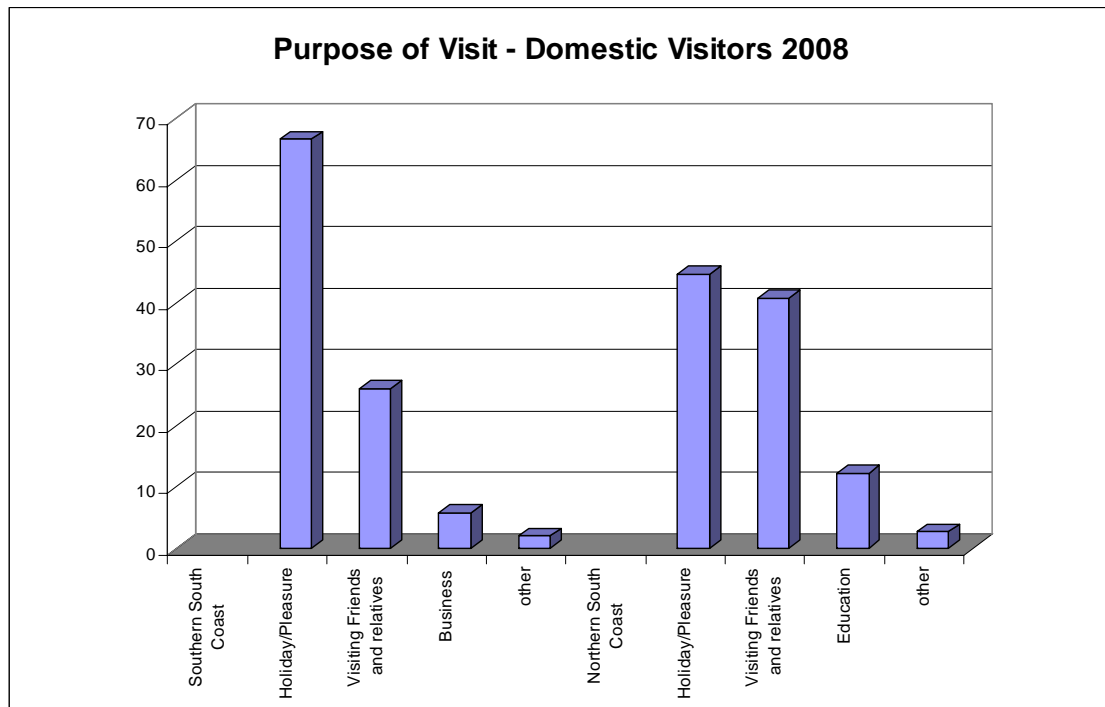
South Coast Tourism Profile

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 2008. Prepared by Tourism New South Wales from figures supplied by Tourism Research Australia. The full documents are attached.

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

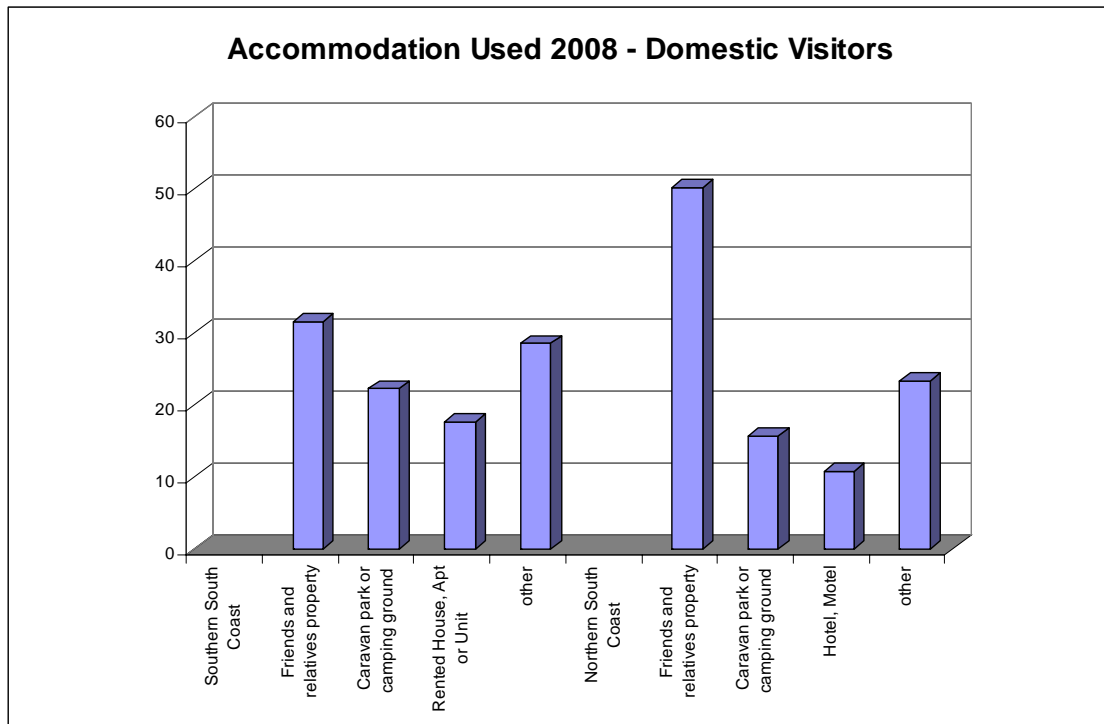
Purpose of Visit - Visitors 2008	
Southern South Coast	
Holiday/Pleasure	66.6
Visiting Friends and relatives	26.0
Business	5.8
other	2.0
Northern South Coast	
Holiday/Pleasure	44.7
Visiting Friends and relatives	40.7
Education	12.2
other	2.7



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

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

Accommodation Used 2008	%
Southern South Coast	
Friends and relatives property	31.6
Caravan park or camping ground	22.3
Rented House, Apt or Unit	17.6
other	28.5
Northern South Coast	
Friends and relatives property	50.2
Caravan park or camping ground	15.7
Hotel, Motel	10.8
other	23.3



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

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

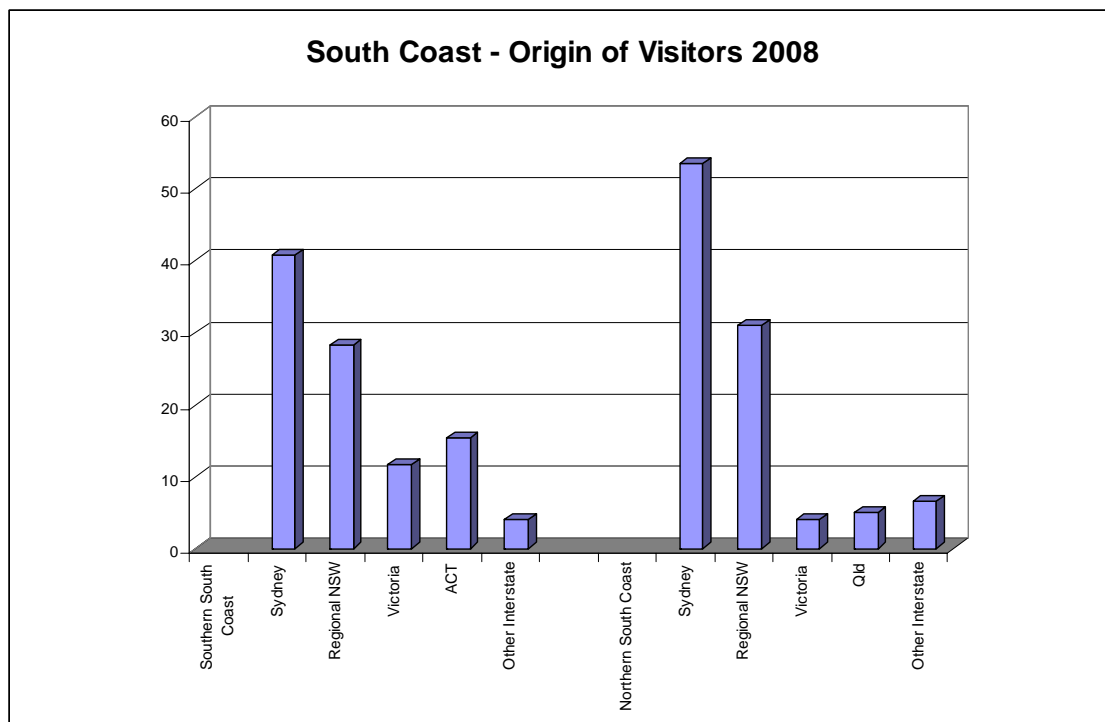
During 2008 the average length of stay was 4 nights.

Source: [Tourism Research Australia, National Visitor Survey, YE Dec 2008](#)

	Domestic	international
Shoalhaven and JBT	3.2 nights	5.5 nights
South Coast (incl Educational Within Wollongong City)	3.5 nights	30 nights

From where Do Our Visitors Come?

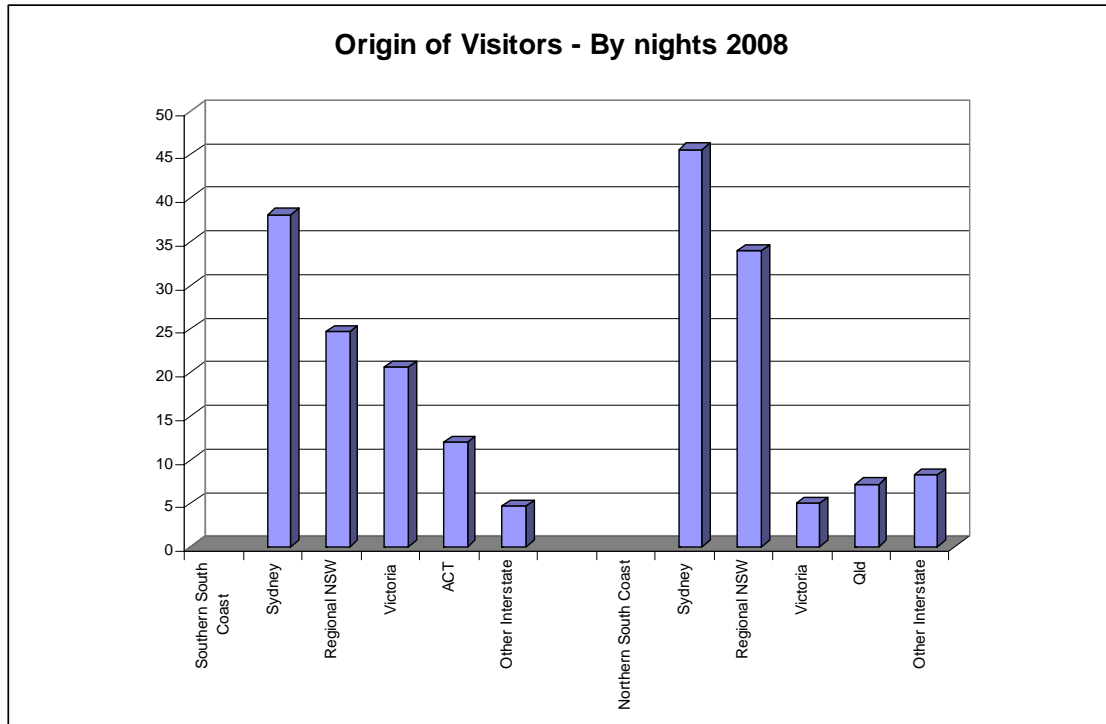
From where do our Visitors come	
Origin of Visitors - 2008 by Visitors	%
Southern South Coast	
Sydney	40.7
Regional NSW	28.2
Victoria	11.7
ACT	15.3
Other Interstate	4.0
Northern South Coast	
Sydney	53.4
Regional NSW	31.0
Victoria	4.0
Qld	5.0
Other Interstate	6.6



Source: [Tourism Research Australia, National Visitor Survey, YE Dec 2008](#).

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
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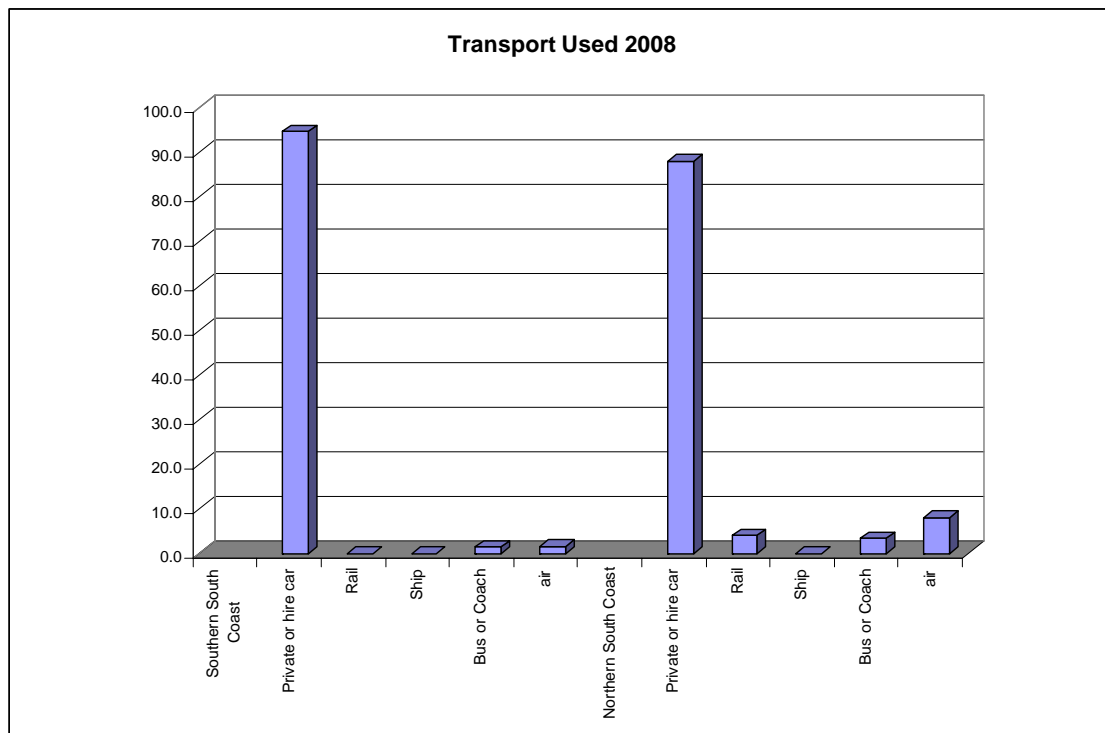
Origin of Visitors - 2008 by Nights	%
Southern South Coast	
Sydney	38.1
Regional NSW	24.7
Victoria	20.6
ACT	12.0
Other Interstate	4.7
Northern South Coast	
Sydney	45.6
Regional NSW	33.9
Victoria	5.0
Qld	7.2
Other Interstate	8.2



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

What Transport Do Our Visitors Use?

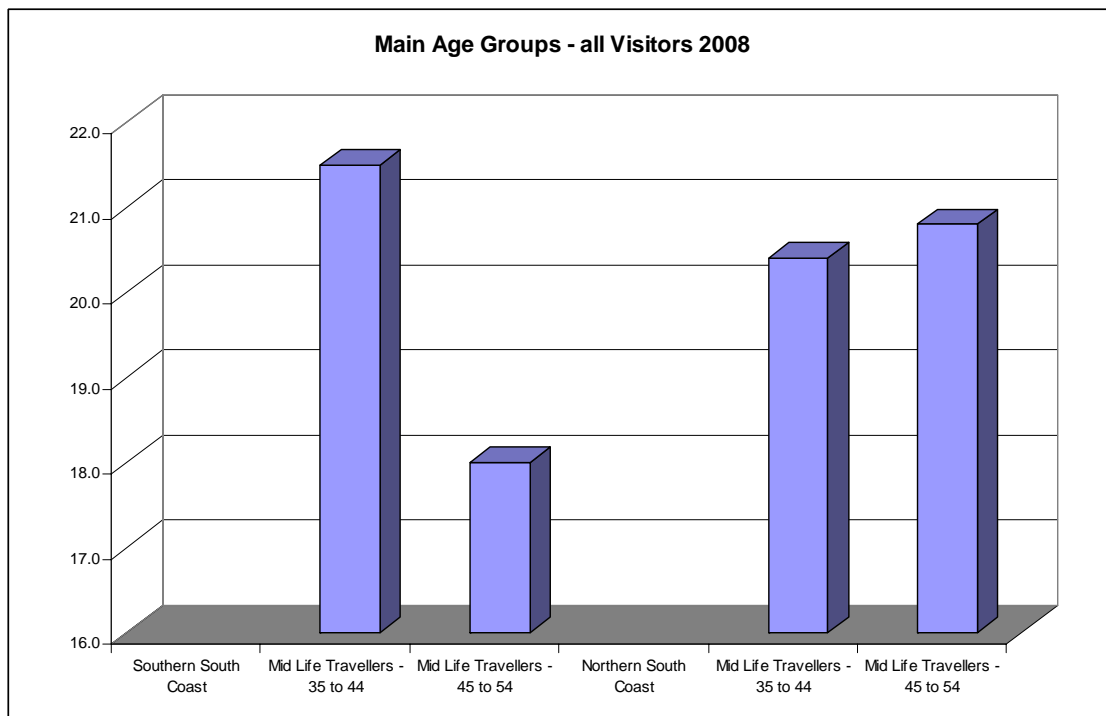
What Transport Do Our Visitors Use?	
	%
Transport Used 2008	
Southern South Coast	
Private or hire car	94.4
Rail	0.0
Ship	0.0
Bus or Coach	1.4
air	1.6
Northern South Coast	
Private or hire car	87.9
Rail	3.9
Ship	0.0
Bus or Coach	3.3
air	8.0



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

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

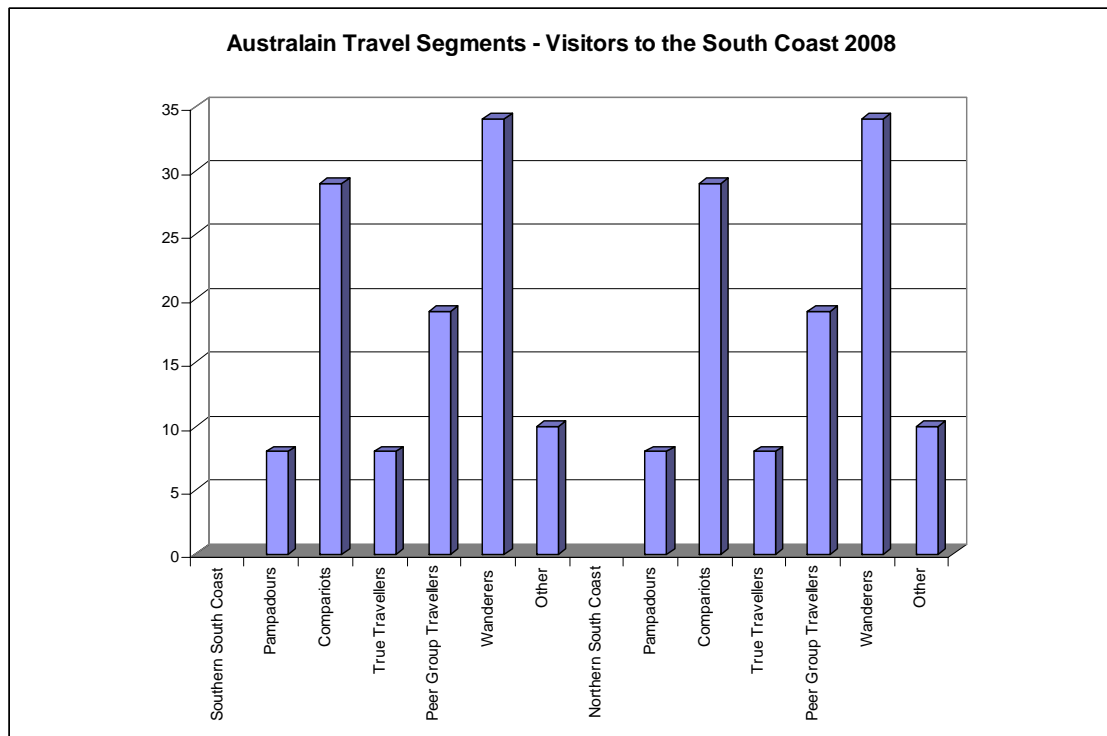
Selected	%
Main Age Groups - all visitors 2008	
Southern South Coast	
Mid Life Travellers - 35 to 44	21.5
Mid Life Travellers - 45 to 54	18.0
Northern South Coast	
Mid Life Travellers - 35 to 44	20.4
Mid Life Travellers - 45 to 54	20.8



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

Travel Segments / Demographics

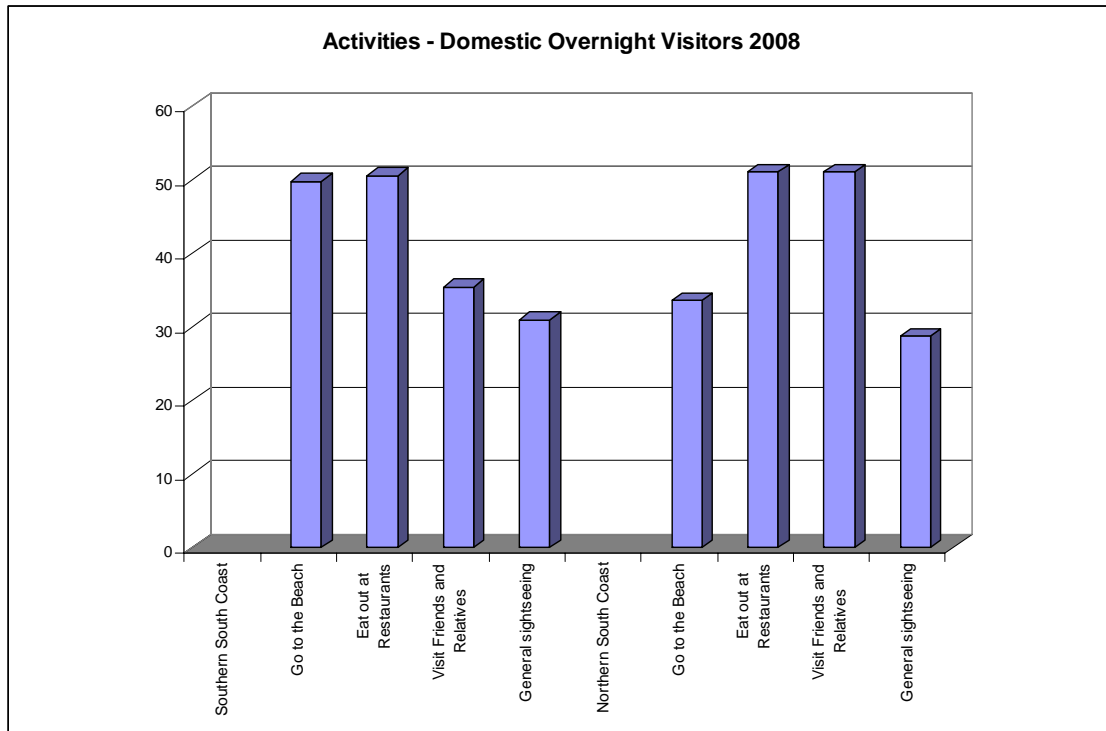
Australian Travel Segments – Visitors to the South Coast	
2008	%
Southern South Coast	
Pampadours	8.0
Compariots	29.0
True Travellers	8.0
Peer Group Travellers	19.0
Wanderers	34.0
Other	10.0
Northern South Coast	
Pampadours	8.0
Compariots	29.0
True Travellers	8.0
Peer Group Travellers	19.0
Wanderers	34.0
Other	10.0



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008

Preferred Activities of Visitors – South Coast 2006

Activities - overnight visitors 2008	%
Southern South Coast	
Go to the Beach	49.8
Eat out at Restaurants	50.6
Visit Friends and Relatives	35.4
General sightseeing	31.0
Northern South Coast	
Go to the Beach	33.6
Eat out at Restaurants	51.1
Visit Friends and Relatives	51.1
General sightseeing	28.7



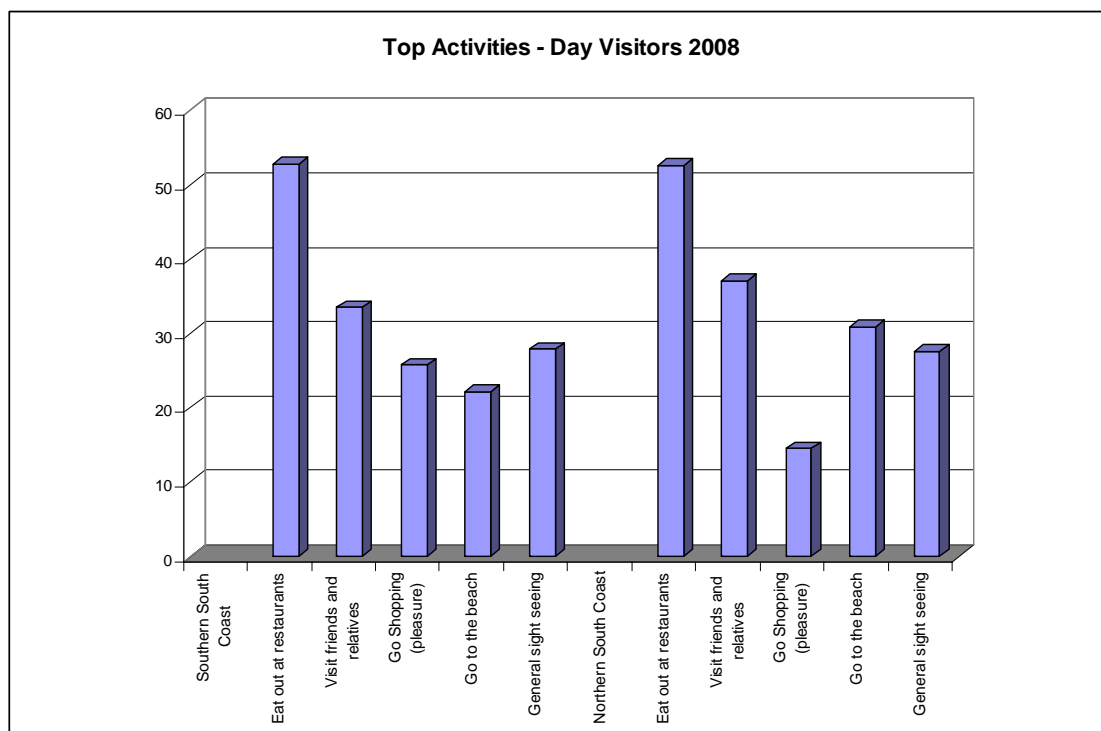
Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008

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 - 2008

Top Activities - Day Visitors 2008	%
Southern South Coast	
Eat out at restaurants	52.8
Visit friends and relatives	33.5
Go Shopping (pleasure)	25.7
Go to the beach	22.2
General sight seeing	27.9
Northern South Coast	
Eat out at restaurants	52.6
Visit friends and relatives	37.1
Go Shopping (pleasure)	14.5
Go to the beach	30.9
General sight seeing	27.6

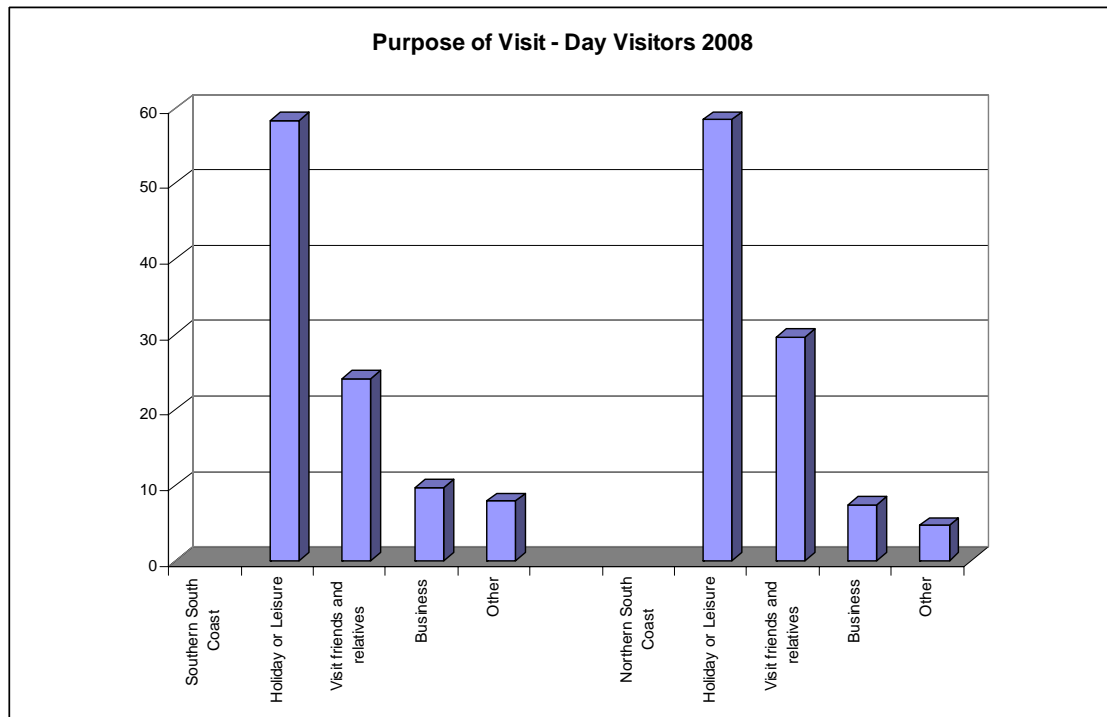


Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
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Purpose Of Visit – Day Visitors

Purpose of Visit - Day Visitors 2008	%
Southern South Coast	
Holiday or Leisure	58.3
Visit friends and relatives	24.1
Business	9.7
Other	7.9
Northern South Coast	
Holiday or Leisure	58.4
Visit friends and relatives	29.6
Business	7.4
Other	4.6



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.

International Visitors to the South Coast Region

Origin of International Visitors to the South Coast Region

International Visitors to the South Coast Region

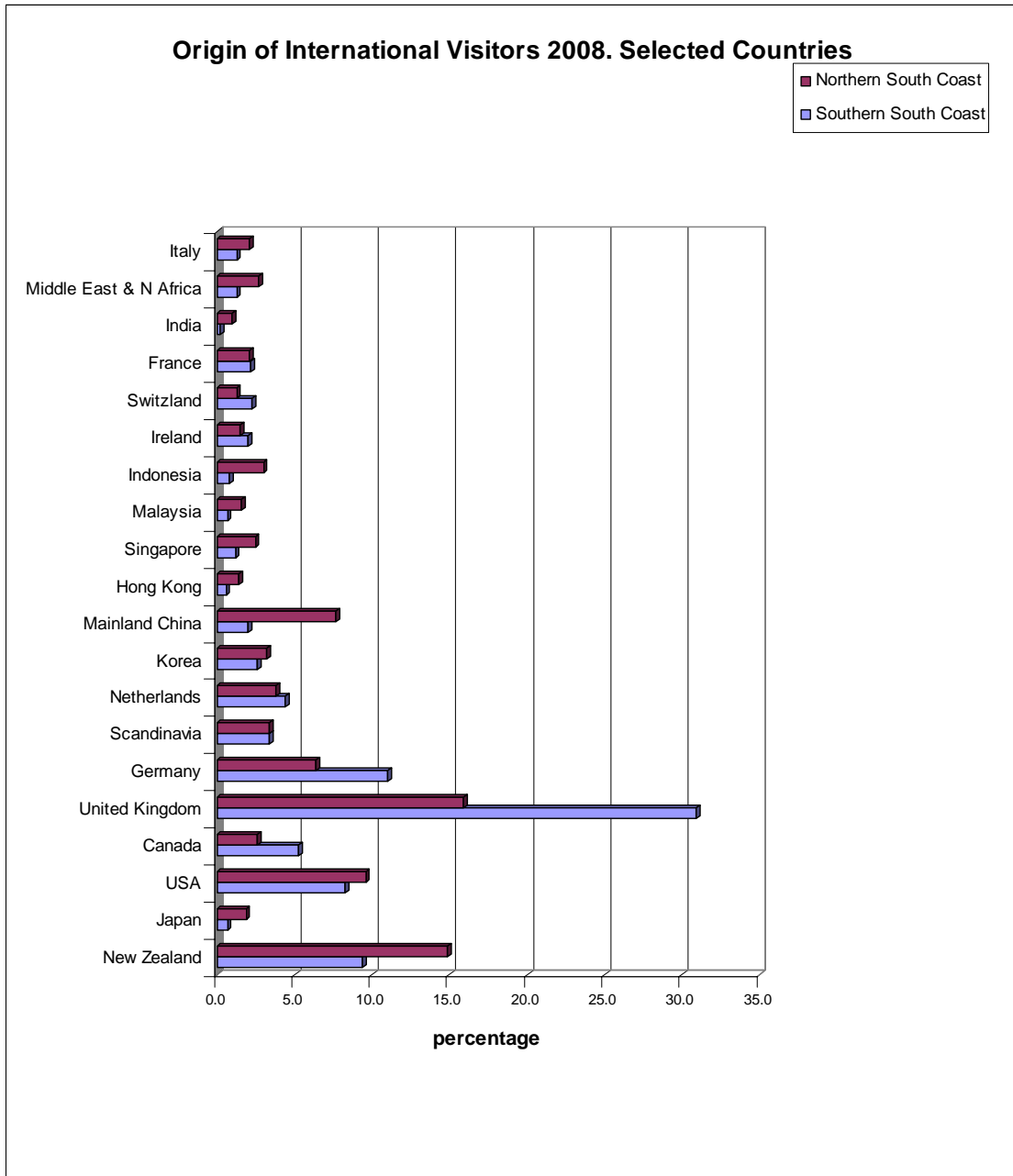
Origin of International Visitors to the South Coast Region

Origin of International Visitors 2008	Southern South Coast	Northern South Coast
New Zealand	9.4	14.9
Japan	0.7	1.9
USA	8.3	9.6
Canada	5.3	2.6
United Kingdom	30.9	15.9
Germany	11.0	6.4
Scandinavia	3.4	3.4
Netherlands	4.4	3.8
Korea	2.6	3.2
Mainland China	2.0	7.7
Hong Kong	0.6	1.4
Singapore	1.2	2.5
Malaysia	0.7	1.6
Indonesia	0.8	3.0
Ireland	2.0	1.5
Switzerland	2.3	1.3
France	2.2	2.1
India	0.2	1.0
Middle East & N Africa	1.3	2.7
Italy	1.3	2.1

Total International Visitors

- Northern South Coast (Illawarra)– 51,000 Visitors. 1,573,000 Visitor Nights. Note this includes visitation for educational visits (mainly to Wollongong University. Average length of stay – 31 nights)
- Southern South Coast – 62,000 Visitors. Unreliable data for Visitor Nights

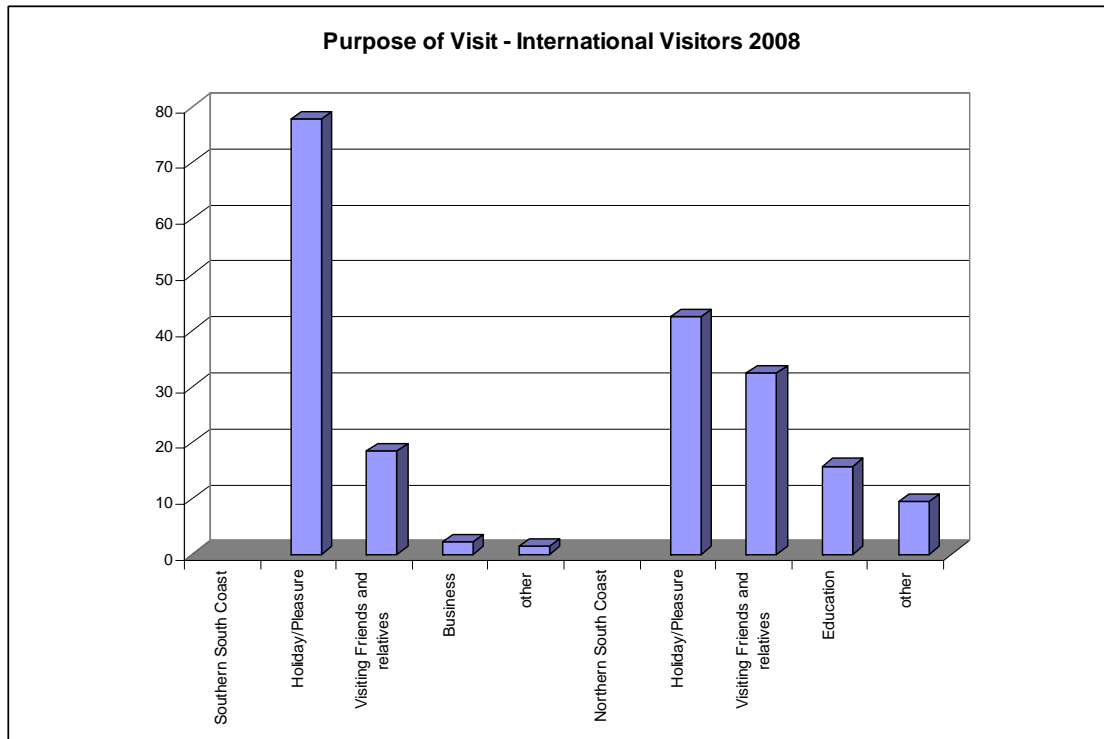
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Source: Tourism Research Australia, International Visitor Survey, YE Dec 2008

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2008*

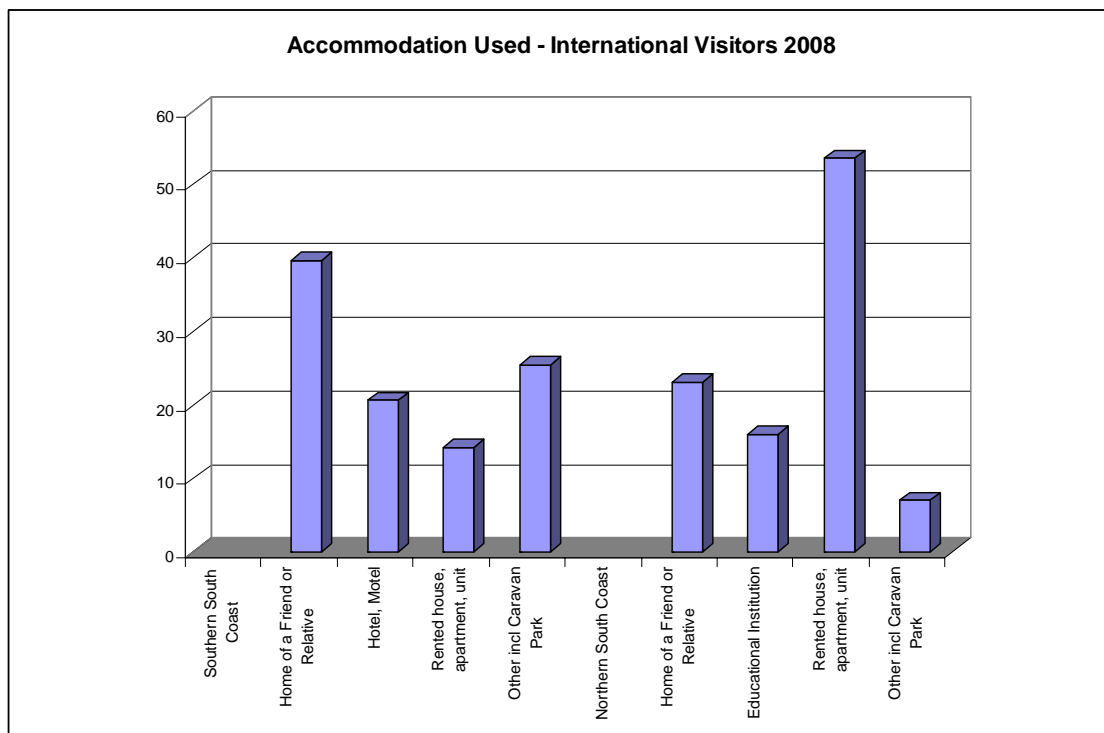
Purpose of Visit of International	
Visitors to the South Coast	%
Southern South Coast	
Holiday/Pleasure	77.8
Visiting Friends and relatives	18.5
Business	2.2
other	1.5
Northern South Coast	
Holiday/Pleasure	42.4
Visiting Friends and relatives	32.4
Education	15.8
other	9.4



Source: Tourism Research Australia, International Visitor Survey, YE Dec 2008.

Accommodation Used - International Visitors 2006

	%
Southern South Coast	
Home of a Friend or Relative	39.7
Hotel, Motel	20.6
Rented house, apartment, unit	14.2
Other incl Caravan Park	25.5
Northern South Coast	
Home of a Friend or Relative	23.1
Educational Institution	16.0
Rented house, apartment, unit	53.5
Other incl Caravan Park	7.0



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2008.