

# City of Shoalhaven

## Visitor Volumes & Estimated Economic Impact

Includes updated Market Profiles for South Coast Tourism Region and Sub-Regions

Year ending June 30, 2015



**South Coast Regional Tourism Organisation**  
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# 1. Introduction

## *Challenges of measuring the value of tourism*

This document has been prepared to inform those concerned with the overall economic development of the Shoalhaven. As the tourism industry is made up of 'portions' of a large range of industries defined in the Australian and New Zealand Standard Industrial Classification (ANZSIC) it can be easily undervalued. Tourism Satellite Accounts (TSA) were developed in response to this. TSA captures the 'tourism' component of the ANZSIC industry classification and, therefore, produces a more accurate measure of the economic significance of tourism. It is a formal component of National and State accounts. Unfortunately, TSA is not available below the State level at this stage. Whilst TSA may be applied to NSW Tourism Regions in the coming years as a Destination NSW initiative, it is highly unlikely that they will ever be available a Local Government Area (LGA) level.

Despite this, steps can and should be taken to ensure the best available visitor volume and visitor expenditure data is used as a part of efforts to measure the economic significance of tourism at a Local Government Area Level. Whilst it is acknowledged that visitor expenditure is a 'gross' indicator, it should equally be acknowledged that tourism consumption is greater than visitor expenditure. Tourism consumption, as defined in the Australian TSA and the revised international standards, includes imputations for the consumption, by visitors, of certain services for which they do not make a payment (imputed consumption). Imputed consumption included in the TSA includes:

1. Services provided by one household to the visiting members of another household free of charge, including the value of goods such as food and purchased services provided by host family/friends
2. Housing services provided by vacation homes on own account (imputed services of holiday homes deemed to be consumed by their visitor owners)
3. Imputed values of non-market services provided directly to visitors such as public museums even though these may be provided free or at a price which is not economically significant.

Imputed consumption cannot be measured at a Regional or LGA level. To this extent, measures of gross visitor expenditure are conservative. This works to offset, in part, for the cost of goods and services that a local economy is required to 'import'. Visitor expenditure, in combination with timely LGA-specific visitor volume estimates, is therefore an important input to all efforts related to the assessment of tourism's economic significance.



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### *'Off-book' components of tourism's significance*

The economic significance of tourism also includes elements that cannot readily be quantified. The characteristics of these elements mean that they fall outside of all standard accounting methodology in addition to those that utilise or incorporate reference to Tourism Satellite Accounting. These elements fall into two main categories:

1. Tourism promotions Influence upon overall place image
2. Non-tourism Investment and expenditures as a result of a tourism visit.

Tourism promotion efforts, by definition, presents the 'place'. They present a wide range of place assets and characteristics as a part of the objective of informing potential visitors 'what the place is like. These promotion efforts, however, cannot be restricted to potential visitor target audiences. They utilise communication channels and mediums that spill over into other audiences. It is inevitable that these audiences include people who are – or will be in the future - in a position to 'buy' the place for reasons other than for a tourism visit. These include, for example, decisions related to new investments, business relocation and also choices related to a place to live. Given these 'place-buying-decisions' are influenced profoundly by a place's image<sup>1</sup> - and tourism promotion is a key contributor to place image - it therefore plays a pivotal role in overall economic development. The power of this influence is much greater than overt commercial attempts to 'sell' a place for overall economic development reasons. This is not the objective of tourism promotion and, as such, it has much greater legitimacy and believability.

This value is created in market. Additional value is created when potential visitors become actual visitors. As it is with tourism promotion, those who visit a place for tourism purposes cannot be prevented from being exposed to the range of assets and characteristics of the place in general. For those visitors in a position to consider non-tourism investment or expenditure in a place such as that being visited, this 'first hand' exposure cannot be prevented from influencing these decisions. These non-tourism investment decisions, moreover, may not have previously considered the place being visited if not for their visit as a tourist. This influence is arguably far more powerful than obvious commercial efforts to encourage investment. Unfortunately, as with tourism promotion, these tourism-benefits cannot be readily quantified.

It is well beyond the scope of this document to attempt to do this. It is hoped, however, that they are at least acknowledged as real and significant benefits of tourism. This document is limited to benefits that can be quantified *and* have existing sources of data.

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<sup>1</sup> Place image is the equivalent of a brand in the private sector. Whilst destinations are commonly referred to as brands, the value of this brand is valued in the same manner as it would be in the private sector.



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### *Tourism Data in Australia*

Australia is renowned for the scope and quality of its tourism data. These include what are arguably the most detailed ongoing domestic and international visitor surveys in the world in the form of the National Visitor Survey (NVS) and the International Visitor Survey (IVS). The NVS and IVS are administered by Tourism Research Australia (TRA). TRA (part of Austrade) is jointly funded by the Federal Government and State/Territory Governments under the auspices of the Australian Standing Committee on Tourism (ACSOT).

The NVS captures data relating to domestic overnight, domestic day and overseas travel. The IVS, as the name suggests, captures data related to international visitor trips to Australia. Both capture information related to both visitor characteristics and the trips they make. NVS and IVS data supports a range of modelling and reporting efforts. These include regular reports and publications related to Tourism Regions, each State/Territory, and for Australia as a whole.

Data in the NVS and IVS is, however, available for much smaller areas. As of January 2012, data is collected at an SA2 level (Statistical Area – Level 2). Given the sheer number of these it is not possible or practicable to produce ongoing publications related to them or other sub-Regional destinations. It can be accessed, however, on an as-required basis via the full NVS and IVS datasets. In this way, otherwise unpublished tourism data related to the Shoalhaven Local Government Area and South Coast 'Sub-Regions' can be obtained. Unpublished data related to these areas is presented in this document - along with published data and other relevant information - in order to provide an overall view of the size and significance of the Shoalhaven tourism economy and the broader destination and market context in which it operates.

Differences between year end June 2015 estimates and the last report (year end June 2013) are a result of changes in visitor volumes and changes in expenditures. The NVS methodology was also enhanced in 2014 to include respondents that do not have landlines. Methodological adjustments have also been made to the jobs estimation process. These include discounts to assumptions used in the previous report. Combined, this results in a break in series with the year end June 2013 report. Direct comparisons between this report and the previous report(s) should not be made.



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## Visitor Type Definitions

Visitor definitions applied to the data presented in this document are those used by Tourism Research Australia in the collection of data for the NVS and IVS. These are, in turn, based on those provided by the United Nations World Tourism Organisation.

Three main definitions are applied in this document:

### 1. Domestic Overnight Trips

- Trips made by Australian residents involving a stay away from home for at least one night, at a place at least 40 kilometres from home.
- Trips where the respondent is away from home for more than 12 months are excluded.
- As one trip = one visitors word 'trips' and 'visitors' is used interchangeably

### 2. Domestic Day Visitors

- Day visitors are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least four hours and do not spend a night away from home.
- Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home.
- Trips where the respondent is away from home for more than 12 months are also excluded.

### International Visitors

- Visitors from overseas who spend less than 12 months in Australia.
- Visitor and nights estimates relate to those who stay overnight in destinations.
- International day visitors to a destination are therefore not counted in this document and are therefore excluded from estimates of economic significance.



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# 2. Tourism in the Shoalhaven

## Visitor Volume

Visitor volume estimates for the year ending June 2015 are shown below. Two measures of volume are used: number of visitors and; for those who are overnight visitors, the number of nights they spent in the Shoalhaven Local Government Area<sup>2</sup>. As noted, there is no data source for International day visitors. This visitor category would need to be added to the total below to estimate total visitors.

### Overnight & Day Visitors

Visitor Category	(000)
Domestic Overnight Visitors	1,345
Domestic Day Visitors	1,403
International Overnight Visitors	40
International Day Visitors	Data does not exist
<b>TOTAL VISITORS*</b>	<b>2,788</b>

**Table 1: Shoalhaven Visitor Volume x Visitor Category 2014/15**

Data Source: Tourism Research Australia: National Visitor Survey (2014, 2015), International Visitor Survey (2014, 2015).

### Visitor Nights

Visitor nights refers to the number of nights spent in the location by visitors that spent at least one night in the destination.

Visitor Category	(000)
Domestic Visitor Nights	4,309
International Visitor Nights	249
<b>TOTAL VISITOR NIGHTS</b>	<b>4,558</b>

**Table 2: Shoalhaven Visitor Nights Estimates x Visitor Category 2014/15**

Data Source: Tourism Research Australia: National Visitor Survey (2014, 2015), International Visitor Survey (2014, 2015).

<sup>2</sup> It is the norm to combine the Shoalhaven LGA with Jervis Bay Commonwealth Territory. This does not result in double counting for visitors that visit both locations. These visitors are counted as one visitor.



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### Visitor Expenditures

Visitor expenditures have been estimated by combining the above visitor volume estimates with estimates of expenditure per night (for overnight visitors) and expenditure per visit (for domestic day visitors). As indicated above, data for international day visitor volume is not produced. The same is true of expenditure estimates for this category of visitor. They have, therefore, been excluded from the expenditure estimates.

Visitor Category	\$m
Expenditure by Domestic Overnight Visitors	573
Expenditure by Domestic Day Visitors	149
<i>Total Domestic Visitor Expenditure</i>	<i>677</i>
Expenditure by International Overnight Visitors	21
Expenditure by International Day Visitors*	Estimate not possible
<b>TOTAL EXPENDITURE*</b>	<b>698</b>

**Table 3: Shoalhaven Visitor Expenditures<sup>3</sup> x Visitor Category 2014/15**

Data Sources: Tourism Research Australia; National Visitor Survey (2014, 2015), International Visitor Survey (2014, 2015); & Tourism Research Australia; Modelled visitor expenditure in Australia's Regions, YE Jun 15, South Coast as presented in Destination NSW, Travel to South Coast NSW region year end June 2015.

\*International day visitors, or expenditure by them, cannot be measured.

### Expenditure Items – Domestic Overnight Visitors

Although TRA modelling provides expenditure estimates per trip and per night (as used in the above expenditure summary table), there is no modelling currently available to provide a breakdown of expenditure for specific Regions or other specific destinations. It is possible, however, to extract viable destination-specific expenditure breakdowns for domestic overnight visitors who spend all trip nights in one location.

In the case of Shoalhaven Local Government Area, this accounts for almost 90% of domestic overnight visitors. Whilst some expenditure categories (such as fuel) may clearly relate to locations other than Shoalhaven, a number of categories (such as Accommodation) can be fully, or near to fully allocated to Shoalhaven. The following table presents expenditure estimates for these categories for the near-90% of domestic overnight visitors that spend all trip nights in the Shoalhaven Local Government Area.

<sup>3</sup> Note: Imputed consumption is not included in the expenditure estimates



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Expenditure Category	\$m
Accommodation	146.0
Groceries for self-catering	68.0
Alcohol, drinks (not already reported)	35.1
Takeaways and restaurant meals	70.4
Shopping / gifts /souvenirs	32.9
Entertainment	9.0

**Table 4: Expenditure breakdown estimates for Shoalhaven Domestic Overnight Visitors who spend all trip nights in Shoalhaven Local Government Area – Average p.a. based on 5 years ending June 2015<sup>4</sup>**

Data Source: Tourism Research Australia; National Visitor Survey (2011- 2015),

If it is assumed that the expenditure profile of the remaining 10% of domestic overnight visitors is the same as the above visitors, the total increases accordingly:

Expenditure Category	\$m
Accommodation	167.8
Groceries for self-catering	78.1
Alcohol, drinks (not already reported)	40.4
Takeaways and restaurant meals	80.9
Shopping / gifts /souvenirs	37.8
Entertainment	10.3

**Table 5: Expenditure breakdown estimates of Shoalhaven Domestic Overnight Visitors – Average p.a. based on 5 years ending June 2015<sup>5</sup>**

Data Source: Tourism Research Australia; National Visitor Survey (2011- 2015),

### IMPORTANT NOTE

Estimates in Tables 4 and 5 do not relate to all visitors. They only relate to domestic overnight visitors.

<sup>4</sup> These estimates only relate to those domestic overnight visitors that spend all trip nights in Shoalhaven LGA.

<sup>5</sup> These estimates assume the visitor expenditure profile is the same for all domestic overnight visitors.





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### Shoalhaven Jobs Supported by Tourism

The subject of how many jobs are supported by tourism at a Local Government Area level is presented with a number of challenges. Some of these are noted in Section 1. A number of assumptions must therefore be made to provide an indication of the significance of tourism in terms of jobs.

Given the multi-industry- spread of visitor expenditure and the absence Tourism Satellite Accounting at a Local Government Area level, these estimates should be seen as providing an indication of the number of jobs supported – not an actual count. As with any current efforts at estimating the number of tourism-supported-jobs at a Local Government Area level, some reference to State level tourism expenditure and employment relationships cannot be avoided. Where required, however, these have not been used without downwards adjustment.

Given Local Government Area specific visitor volume estimates have been used (refer Tables 1 & 2 above) in conjunction with visitor expenditure modelling undertaken by Tourism Research Australia, they should not be discounted as a contribution to better understanding the economic significance of tourism in the Shoalhaven Local Government Area.

Job Category	Jobs
Direct	4,740
Indirect	2,150
<b>TOTAL</b>	<b>6,890</b>

**Table 6: Estimate of jobs supported by Tourism in the Shoalhaven Local Government Area 2014/15**

Data Sources:

Tourism Research Australia; National Visitor Survey (2014, 2015), International Visitor Survey (2014, 2015);  
Modelled visitor expenditure in Australia's Regions, YE Jun 15, South Coast; Tourism Employment  
in Australia 2011–12 To 2029–30

Destination NSW: Economic Contribution of Tourism to NSW 2013-14;

*As these estimates include visitor expenditure as a part of the estimation process, they do not include any expenditure assumptions related to international day visitors in the Shoalhaven Local Government Area. As indicated above, given no data for visitor volume in this category exists. This is also true of expenditures.*



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### 3. Tourism Region Comparisons

#### Overall Comparison

The following table summarises a range of tourism measures for each Tourism Region in NSW. Visitor Volume data is sourced from Tourism Research Australia's National and International Visitor Surveys for the year 2014/15. The source of visitor expenditure data is Tourism Research Australia (as presented in Destination NSW's Regional Tourism time series compendium). This utilises TRA's Regional Visitor Expenditure Allocation Model.

	DOMESTIC			INTERNATIONAL		OVERALL
	Overnight Visitors (000)	Nights (000)	Day Visitors (000)	Overnight Visitors (000)	Nights (000)	Expenditure \$billion
Sydney	9,020	24,920	18,390	3,100	67,310	15.20
North Coast NSW	4,480	16,770	5,760	290	3,120	3.30
<b>South Coast</b>	<b>3,410</b>	<b>12,070</b>	<b>5,800</b>	<b>130</b>	<b>2,100</b>	<b>2.40</b>
Hunter	3,080	8,770	5,760	160	2,530	2.09
Central NSW	2,010	5,300	2,900	40	620	1.40
Central Coast	1,290	3,940	3,180	40	830	0.83
New England North West	1,260	3,840	1,710	30	760	0.78
Capital Country	1,170	2,950	2,670	20	610	0.65
The Murray	1,070	2,630	1,460	20	230	0.65
Riverina	960	2,190	1,650	20	520	0.66
Blue Mountains	850	2,040	2,530	100	460	0.56
Snowy Mountains	650	2,200	410	20	220	0.54
Outback NSW	370	1,680	240	10	390	0.23
<b>TOTAL</b>	<b>27,450</b>	<b>89,720</b>	<b>52,470</b>	<b>3,310</b>	<b>79,720</b>	<b>29.80</b>

**Table 7: Compendium of Tourism Region Indicators 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015), International Visitor Survey (2014, 2015), Regional Visitor Expenditure Allocation Methodology (as presented by Destination NSW)



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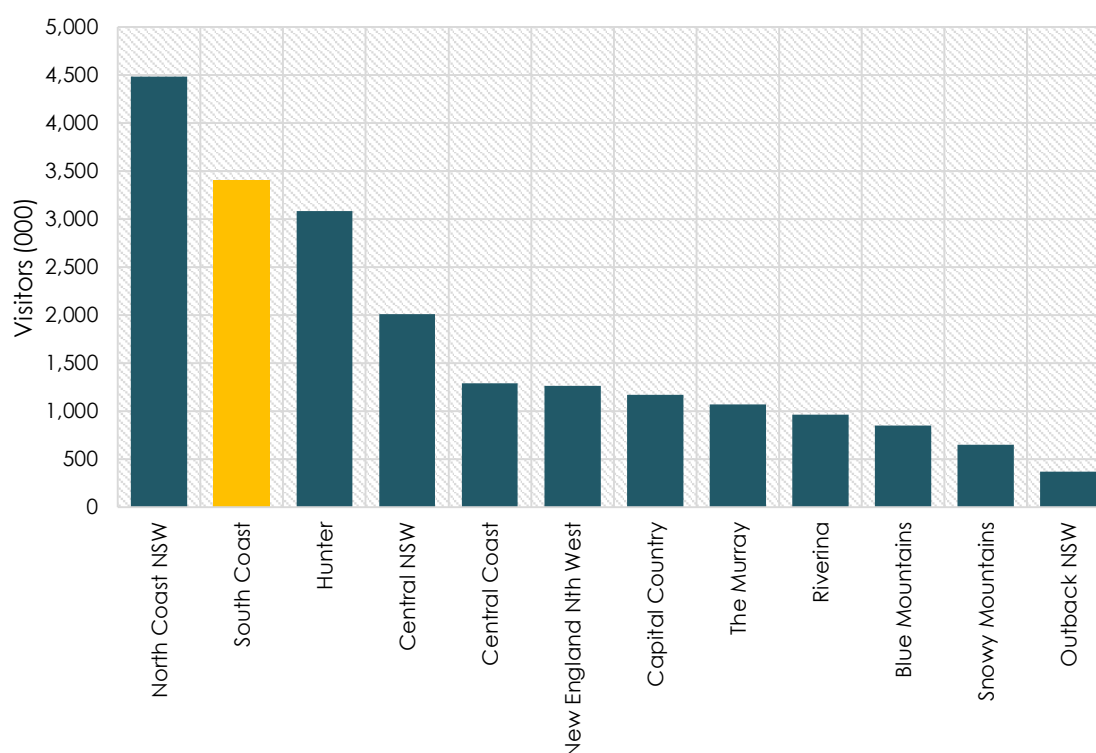
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### Domestic Overnight Visitors - Region Ranking & Share

RANK	Region	Overnight Visitors (000)	% of NSW
1	Sydney	9,020	33%
2	North Coast NSW	4,480	16%
3	South Coast	3,410	12%
4	Hunter	3,080	11%
5	Central NSW	2,010	7%
6	Central Coast	1,290	5%
7	New England North West	1,260	5%
8	Capital Country	1,170	4%
9	The Murray	1,070	4%
10	Riverina	960	3%
11	Blue Mountains	850	3%
12	Snowy Mountains	650	2%
13	Outback NSW	370	1%
<b>TOTAL</b>		<b>27,450</b>	<b>100%</b>

**Table 8: Domestic Overnight Visitors Tourism Region 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



**Chart 1: Domestic Overnight Visitors for Regional NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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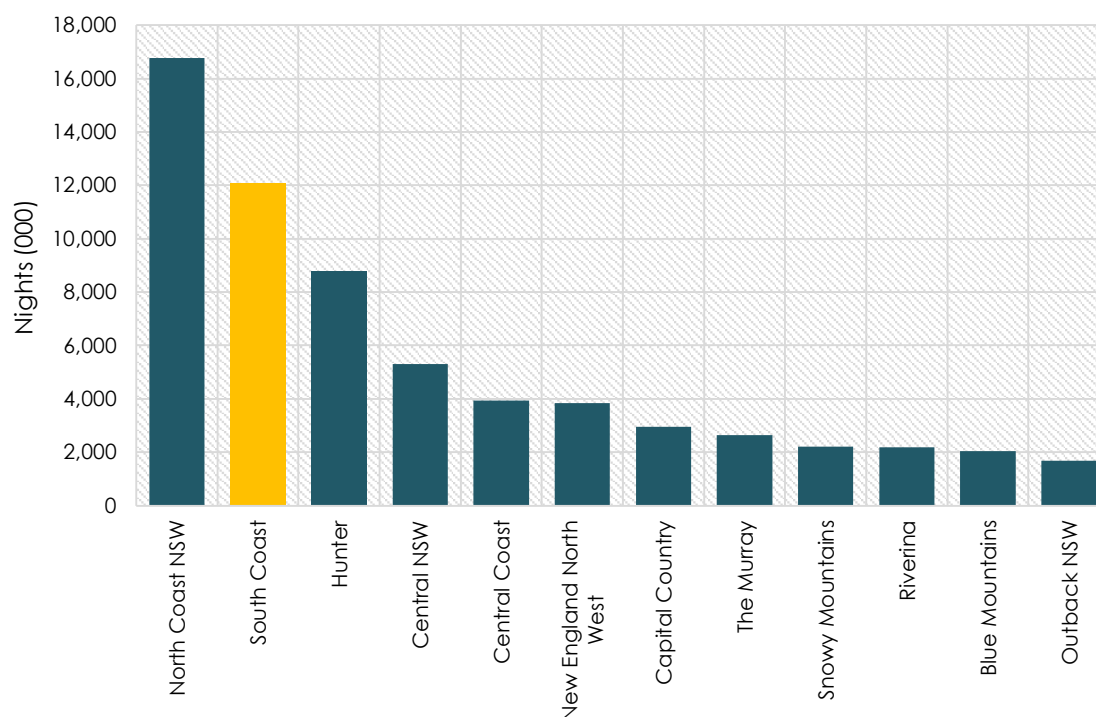
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### Domestic Visitor Nights – Region Ranking & Share

RANK	REGION	Visitor Nights (000)	% of NSW
1	Sydney	24,920	28%
2	North Coast NSW	16,770	19%
3	South Coast	12,070	13%
4	Hunter	8,770	10%
5	Central NSW	5,300	6%
6	Central Coast	3,940	4%
7	New England North West	3,840	4%
8	Capital Country	2,950	3%
9	The Murray	2,630	3%
10	Snowy Mountains	2,200	2%
11	Riverina	2,190	2%
12	Blue Mountains	2,040	2%
13	Outback NSW	1,680	2%
	<b>TOTAL</b>	<b>89,720</b>	<b>100%</b>

**Table 9: Domestic Visitor Nights & Share; NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



**Chart 2: Domestic Nights for Regional NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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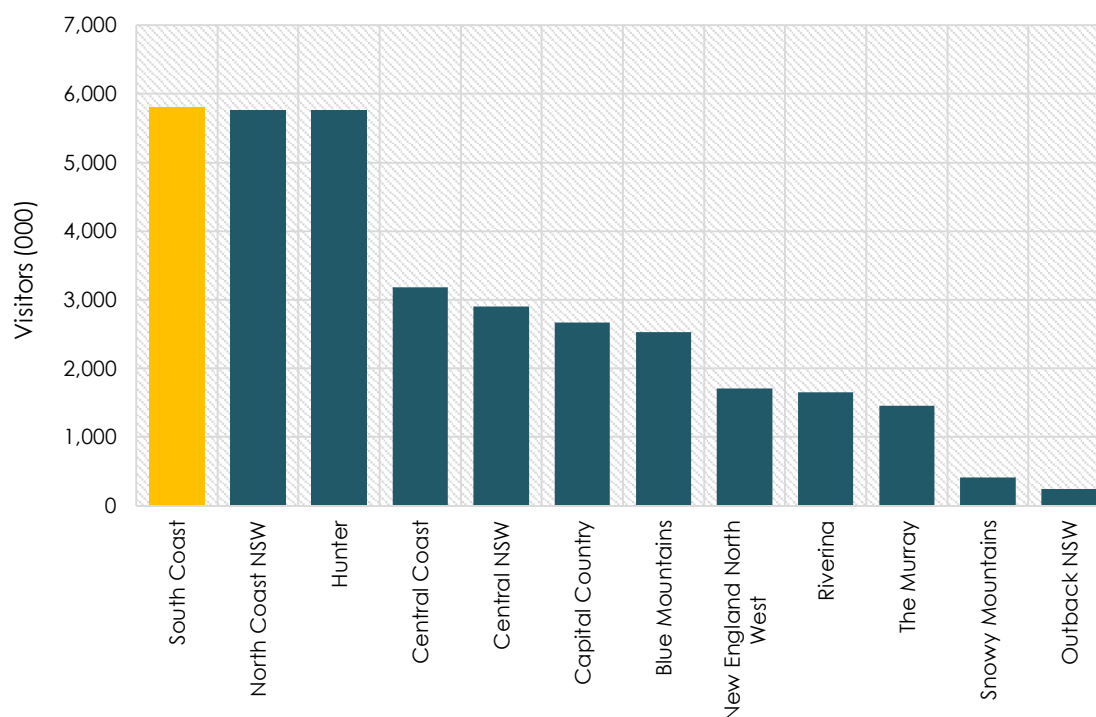
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### Domestic Day Visitors – Region Ranking & Share

RANK	REGION	Day Visitors (000)	% of NSW
1	Sydney	18,390	35%
2	South Coast	5,800	11%
3	North Coast NSW	5,760	11%
4	Hunter	5,760	11%
5	Central Coast	3,180	6%
6	Central NSW	2,900	6%
7	Capital Country	2,670	5%
8	Blue Mountains	2,530	5%
9	New England North West	1,710	3%
10	Riverina	1,650	3%
11	The Murray	1,460	3%
12	Snowy Mountains	410	1%
13	Outback NSW	240	0.5%
	<b>Total</b>	<b>52,468</b>	<b>100%</b>

**Table 10: Domestic Day Visitors & Share; NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



**Chart 3: Domestic Day Visitors for Regional NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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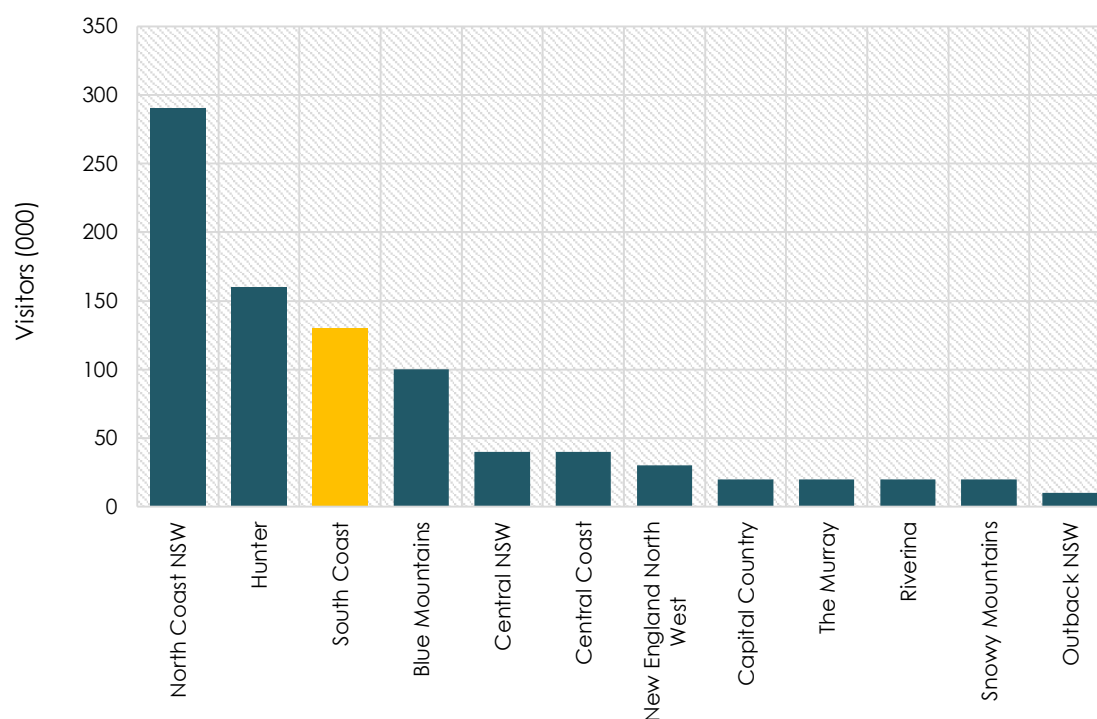
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### International Visitors – Region Ranking & Share

RANK	REGION	Visitors (000)	% of NSW
1	Sydney	3,100	94%
2	North Coast NSW	290	9%
3	Hunter	160	5%
4	South Coast	130	4%
5	Blue Mountains	100	3%
6	Central NSW	40	1.2%
7	Central Coast	40	1.2%
8	New England North West	30	0.9%
9	Capital Country	20	0.6%
10	The Murray	20	0.6%
11	Riverina	20	0.6%
12	Snowy Mountains	20	0.6%
13	Outback NSW	10	0.3%
	<b>Total</b>	<b>3,310</b>	<b>100%</b>

**Table 11: International Visitors & Share; NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



**Chart 4: International Visitors for Regional NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



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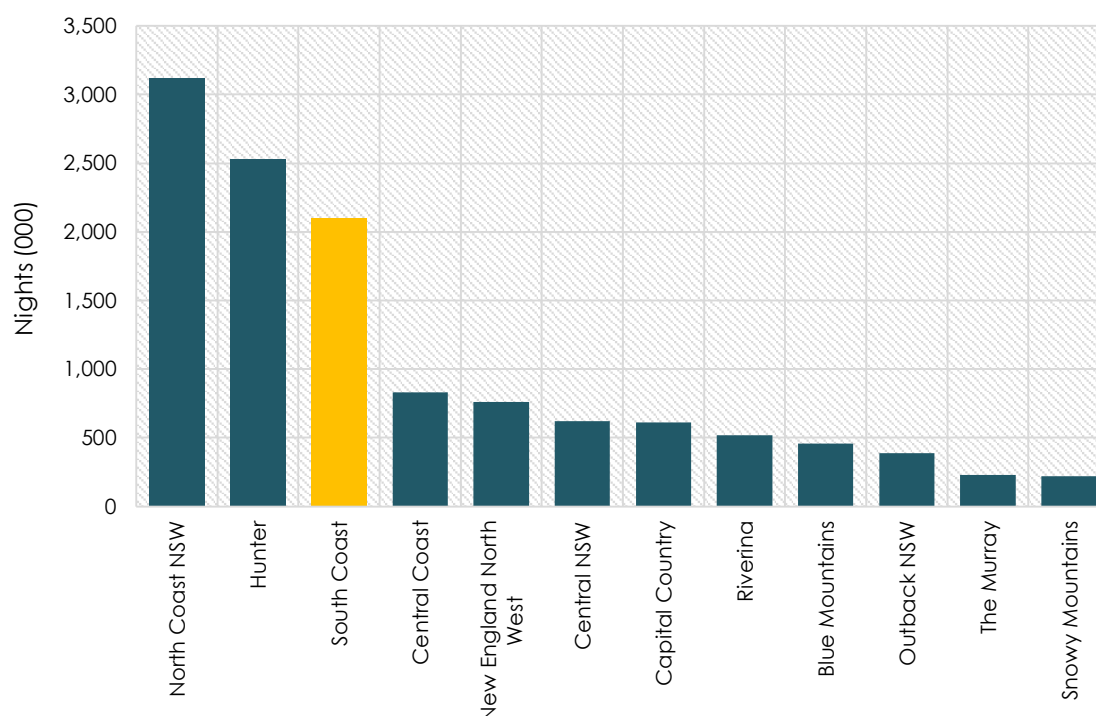
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### International Visitor Nights – Region Ranking & Share

RANK	REGION	Nights (000)	% of NSW
1	Sydney	67,310	84%
2	North Coast NSW	3,120	4%
3	Hunter	2,530	3%
4	South Coast	2,100	3%
5	Central Coast	830	1.0%
6	New England North West	760	1.0%
7	Central NSW	620	0.8%
8	Capital Country	610	0.8%
9	Riverina	520	0.7%
10	Blue Mountains	460	0.6%
11	Outback NSW	390	0.5%
12	The Murray	230	0.3%
13	Snowy Mountains	220	0.3%
<b>Total</b>		<b>79,720</b>	<b>100%</b>

**Table 12: International Visitor Nights & Share; NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



**Chart 5: International Visitor Nights for Regional NSW Tourism Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



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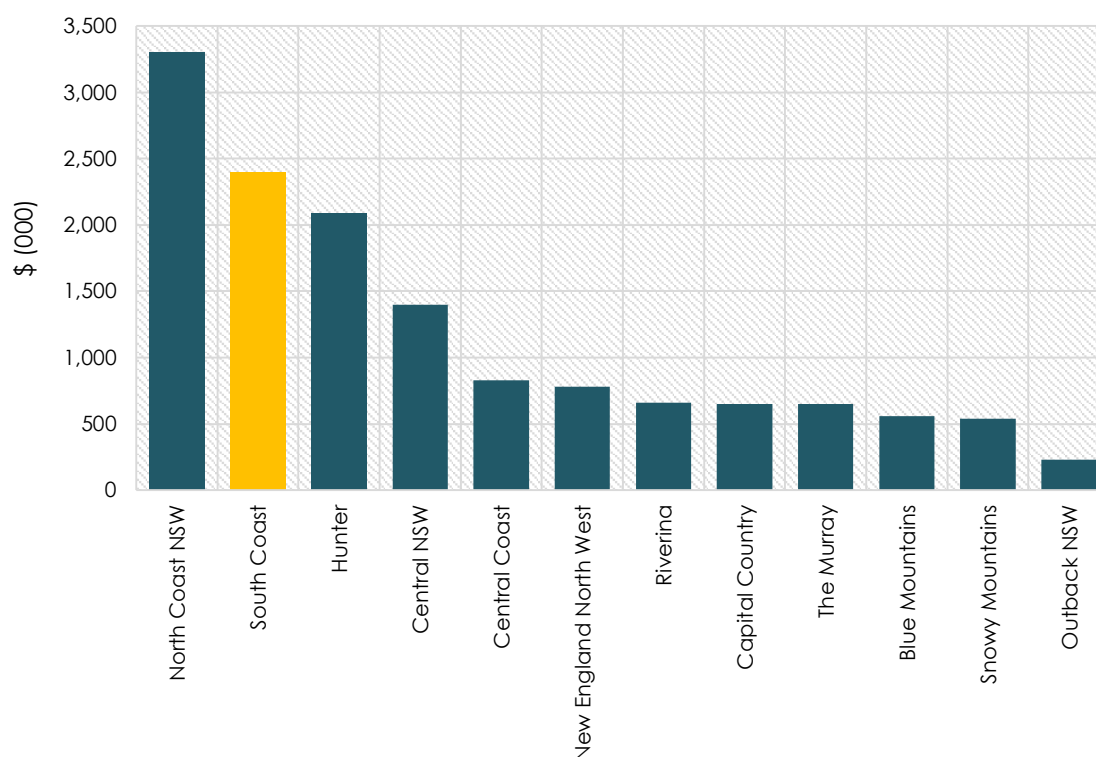
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### Visitor Expenditure – Region Ranking & Share

RANK	REGION	\$ (000)	% of NSW
1	Sydney	15,200	51%
2	North Coast NSW	3,300	11%
3	South Coast	2,400	8%
4	Hunter	2,090	7%
5	Central NSW	1,400	5%
6	Central Coast	830	2.8%
7	New England North West	780	2.6%
8	Riverina	660	2.2%
9	Capital Country	650	2.2%
10	The Murray	650	2.2%
11	Blue Mountains	560	1.9%
12	Snowy Mountains	540	1.8%
13	Outback NSW	230	0.8%
<b>Total</b>		<b>29,800</b>	<b>100%</b>

**Table 13: Visitor Expenditure & Share; NSW Tourism Regions 2014/15**

Data Source: Destination NSW; Regional Tourism Profiles (2014/15) – Utilising Tourism Research Australia; Regional Expenditure, NSW Tourism Regions year ending June 2015.



**Chart 6: International Visitor Nights for Regional NSW Tourism Regions 2014/15**

Data Source: Destination NSW; Regional Tourism Profiles (2014/15) – Utilising Tourism Research Australia; Regional Expenditure, NSW Tourism Regions year ending June 2015.



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## 4. Visitor Profile

The visitor profile data in this document has been extracted directly from the National and International Visitor Survey databases<sup>6</sup>. This has permitted the creation of customised 'sub-regions'. In addition to the South Coast Tourism Region, two customised 'Sub-Regions' have been created:

1. Southern Sub-Region
2. Mid Northern Sub-Region

The Southern Sub-Region is made up of the SA2 geographical areas that make up most or all of the Shoalhaven, Shoalhaven and Shoalhaven Local Government Areas. This Sub-Region largely mirrors the former South Coast (i.e. prior to amalgamation with the Illawarra Region).

The Mid-Northern Sub-Region has been created in response to concern regarding significant differences between the Local Government Areas in the former Illawarra Region (i.e. Wollongong, Shellharbour and Kiama). The size of Wollongong in this mix dominated the former Illawarra Region at the expense of Shellharbour and Kiama. The Mid-Northern Sub-Region is a combination of the SA2 areas that make up Shellharbour and Kiama Local Government Areas, the Dapto-Avondale SA2 and the Berry-Kangaroo Valley SA2.

This is the first time that a profile for a Mid-Northern Sub-Region has been prepared. Whilst beneficial Local Government Areas in the South Coast South of Wollongong, the sample size related to this area means that only the main profile characteristics are estimated. Estimates for less significant profile characteristics in the tables that follow have been withheld. Where this has been done, it can be safely assumed that the profile characteristic is not significant. See the following sample table.

Travel Party Type	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Travelling alone	13%		17%
Adult couple	31%	31%	29%
Family group - parents and children	28%	28%	27%
Friends or relatives - with children	7%		6%
Friends or relatives - without children	18%	22%	19%

Estimates for Travelling Alone and Friends/Relatives travelling with children for Mid-Northern have not been included due to low sample size. It can be assumed that they are relatively insignificant.

<sup>6</sup> The full content, methodology and technical parameters are available online via the Tourism Research Australia website.

## SHOALHAVEN

Visitor Volumes - Estimated Economic Impact – Market Context & Profile  
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### Domestic Overnight Visitor Profile

#### Where did domestic overnight visitors come from?

<i>Origin of Visitor</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Sydney	42%	69%	46%
Other NSW	27%	18%	28%
ACT	16%		13%
Melbourne	6%		5%
Other VIC	4%		3%
Other	5%		5%

**Table 14: Origin of Domestic Overnight Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

#### What was their main purpose of visit?

<i>Main Purpose of Visit</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Holiday	65%	56%	59%
Visiting friends and relatives	25%	39%	32%
Business	7%		7%
Other	2%		2%

**Table 15: Main Reason for Visiting – Domestic Overnight Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

#### What type of travel party did they visit with?

<i>Travel Party Type</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Travelling alone	13%		17%
Adult couple	31%	31%	29%
Family group - parents and children	28%	28%	27%
Friends or relatives - with children	7%		6%
Friends or relatives - without children	18%	22%	19%

**Table 16: Travel Party Types - Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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## SHOALHAVEN

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### What was the length of visit of domestic overnight visitors?

<i>Length of Stay in Destination</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
1 night	19%	25%	24%
2 nights	29%	31%	29%
3 nights	17%	18%	17%
4 - 7 nights	26%	15%	22%
8 - 14 nights	7%		7%

**Table 17: Length of Visit - Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### What type of accommodation did they choose?

<i>Type of Accommodation</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Hotels and similar accommodation	17%	15%	20%
Rented house/apartment/flat or unit	15%		13%
C/van park; commercial camp ground	20%	22%	18%
Own property (e.g. holiday house)	8%		7%
Friends or relatives property	32%	35%	37%
Caravan or camping - non commercial	5%		4%

**Table 18: Accommodation Types – Percentage of Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

<i>Type of Accommodation</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Hotels and similar accommodation	11%	12%	14%
Rented house/apartment/flat or unit	16%		15%
C/van park; commercial camp ground	25%	27%	23%
Own property (e.g. holiday house)	9%		7%
Friends or relatives property	29%	33%	33%
Caravan or camping - non commercial	4%		3%

**Table 19: Accommodation Types – Percentage of Domestic Overnight Visitor Nights - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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## SHOALHAVEN

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### What time of year did domestic overnight visitors come?

<i>Month</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
January	18%	14%	16%
February	8%	10%	8%
March	10%	9%	10%
April	11%	8%	9%
May	7%	6%	7%
June	6%	9%	7%
July	4%	7%	6%
August	5%		6%
September	5%	8%	5%
October	10%	8%	10%
November	8%	9%	8%
December	8%	8%	8%

**Table 20: Month of Trip - Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### What type of activities did domestic overnight visitors do?

<i>Activity Type</i>	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Outdoor/nature	66%	53%	60%
Active outdoor/sports	35%	28%	31%
Arts/heritage	12%		11%
Local attractions/tourist activities	22%	26%	20%
Social activities	87%	90%	88%

**Table 21: Activity Type - Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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## SHOALHAVEN

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### Are there any stand-out activities?

Activity	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
Eat at a restaurant and/or cafe	60%	55%	59%
Go to the beach	56%	40%	51%
Sightseeing/looking around	28%	36%	28%
Pubs, clubs etc	26%	28%	25%
Go shopping for pleasure	25%	28%	24%
Bushwalking / rainforest walks	21%	13%	17%

**Table 22: Specific Significant Activities- Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### What were the ages of domestic overnight visitors?

Age Group	Southern Sub-Region	Mid Northern Sub-Region	South Coast Region
15-19			6%
20-24	6%		7%
25-29	7%	8%	8%
30-34	8%	9%	9%
35-39	6%	8%	6%
40-44	10%	14%	10%
45-49	9%	7%	9%
50-54	13%	11%	13%
55+	35%	34%	33%

**Table 23: Age Group - Domestic Overnight Visitors - South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)



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## Domestic Day Visitor Profile

Domestic day visitors are defined as those who travel for a round trip distance of at least 50 kilometers, are away from home for at least four hours and do not spend a night away from home. Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home. As with domestic overnight visitors, day visit questions in the NVS are asked of those 15 years of age and above.

The significance of day visitors is often undervalued. Some destinations go as far as to ignore them. This can prove a very costly error of judgement for a number of reasons:

1. Day visitors may be the same people who also visit the destination on overnight trips. These people are 'using' the same destination for different trip types. Their day visit is an important part of 'destination bonding' and building brand-loyalty.
2. Compared to overnight trips, day visitors require less commitment in terms of both time and money. This increases the chance that a destination will be 'sampled' by first time visitors. This, in turn, increases the chances of conversion into overnight visitors at a later date.
3. Day visitors spend much more per trip than is often thought. In the year ending June 2015, for example, the average day visitor to the South Coast Region spent \$106 per trip.

The domestic day visitors profile is presented in broader destination terms than that for domestic overnight visitors. This is due to destination similarity in a day visitor context as well as sample size limitations over a 12 month period. In addition to the South Coast Tourism Region, the following two Sub-Regions have been used:

1. Southern South Coast Sub-Region (former South Coast Tourism Region)
2. Northern South Coast Sub-Region (former Illawarra Tourism Region)

Fewer profile breakdowns have been undertaken for day visitors given the less complex nature of day trips.



## SHOALHAVEN

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### Where did the Domestic Day Visitors come from?

<i>Origin of Visitor</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Sydney	25%	81%	60%
Other NSW	65%	18%	36%
Other (mainly ACT)	10%	1%	4%

**Table 24: Origin of Domestic Day Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### What was their Main Purpose of Trip?

<i>Main Purpose of Visit</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Holiday	60%	52%	55%
Visiting friends and relatives	20%	32%	27%
Business		9%	8%
Other	13%	8%	10%

**Table 25: Main Purpose of Visit of Domestic Day Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### How old were they?

<i>Age Group</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
<40	33%	46%	41%
40-54	26%	21%	23%
55+	41%	34%	36%

**Table 26: Age Visit of Domestic Day Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

Note: Wide age groups required to increase sample size and reduce estimation error



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## SHOALHAVEN

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### What Types of Activities did they do?

<i>Activity Type</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Outdoor/nature	30%	36%	34%
Active outdoor/sports	15%	11%	12%
Arts/heritage		8%	6%
Local attractions/tourist activities		NP	7%
Social activities	78%	83%	81%

**Table 27: Activity Types of Domestic Day Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

### Are there any stand-out activities?

<i>Activity</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Eat/dine at restaurant and/or cafe	50%	48%	49%
Visit friends & relatives	27%	36%	32%
Go to the beach	24%	28%	27%
Sightseeing/looking around	18%	21%	20%
Go shopping for pleasure	24%	15%	18%

**Table 28: Major Specific Activities of Domestic Day Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; National Visitor Survey (2014, 2015)

Note: No other specific activities have large enough sample sizes to be included.



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## International Overnight Visitors

This section relates to international visitors that spent at least one night in the Region and/or the two defined Sub-Regions. The same Region/Sub-Region breakdowns have been used as applied in the domestic day visitor profiles. Sample size is the primary reason for this. International day visitors that have not spent at least one night in the Region or Sub-Regions are not included as there is no way to isolate these visitors.

### What Countries do International Overnight Visitors Normally Reside?

<i>Origin of Visitor</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
New Zealand		13%	10%
China			6%
United States of America	8%	10%	9%
Canada			6%
United Kingdom	21%	15%	18%
Germany	12%	10%	10%
France	6%		4%
Netherlands	4%		3%
Other Countries	50%	51%	33%

**Table 29: Country of Residence - International Overnight Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)

Note: No other specific countries have large enough sample sizes to be included for 2014/15

<i>Origin of Visitor</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
New Zealand		13%	10%
China			6%
United States of America	10%	14%	12%
Canada			6%
United Kingdom	19%	15%	17%
Germany	6%	2%	4%
France	3%		4%
Netherlands	3%		2%
Other Countries	60%	56%	39%

**Table 30: Country of Residence - International Visitor Nights – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)

Note: No other specific countries have large enough sample sizes to be included for 2014/15



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### What was the Main Purpose of Visit of International Overnight Visitors?

<i>Main Purpose of Visit</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Holiday	78%	53%	65%
Visiting friends and relatives	21%	38%	30%
Education		11%	6%

**Table 31: Main Purpose of Visit - International Overnight – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)

Note: No other specific purposes have large enough sample sizes to be included in 2014/15

### How long did they stay?

<i>Length of Stay</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
1- 7 nights	85%	74%	80%
8 - 14 nights	6%	10%	7%
15 - 30 nights			6%
31 or more nights		9%	7%

**Table 32: Length of Stay - International Overnight Visitors – South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)

### What Accommodation Types did International Visitors Choose?

<i>Accommodation Type</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Hotel/resort/motel or motor Inn	33%	29%	32%
Rented house/apartment/flat or unit	8%		6%
Cvan park/commercial camp ground	17%	10%	13%
Backpacker or hostel			4%
Friends or relatives property	25%	43%	35%
Caravan or camping - non commercial	9%		6%

**Table 33: Accommodation Types - International Overnight Visitors South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



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## SHOALHAVEN

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### What Travel Party Type did they visit with?

<i>Travel Party Type</i>	Southern Sub-Region	Northern Sub-Region	South Coast Region
Unaccompanied traveller	43%	59%	52%
Adult couple	40%	29%	34%
Family group - parent(s) and children	8%	8%	8%
Friends or relatives travelling together	9%	13%	11%
Friends or relatives - without children	18%	22%	19%

**Table 34: Travel Party Types - International Overnight Visitors South Coast & Sub-Regions 2014/15**

Data Source: Tourism Research Australia; International Visitor Survey (2014, 2015)



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