

SHOALHAVEN CITY COUNCIL

TOURISM to
SHOALHAVEN on the
SOUTH COAST of NSW



**PROFILE AND STATEMENT
OF ECONOMIC IMPACT**
For the year ending 30 June 2012

13th February 2013

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, (Destination New South Wales), as the South Coast Region.

The following estimates have been prepared for Shoalhaven and Jervis Bay Territory on the South Coast for the 12 months ending 30 June 2012.

Year Ending 30th June 2012	Shoalhaven (Incl. JBT)
Number of Domestic Overnight Visitors	1,069,000
Number of Domestic Visitor Nights	3,998,000
Number of Domestic Day Visitors	1,442,000
Expenditure-Domestic Overnight visitors	\$483,758,000
Expenditure by Day Visitors	\$121,128,000
International Visitors	
Number of Visitors	31,000
Number of Visitor Nights - unreliable data	329,000
Number of Day visitors - data not available	0
Expenditure by International Overnight Visitors	\$24,017,000
Expenditure by International Day Visitors	\$0
Totals	\$628,903,000
Total Expenditure by all Visitors	\$629,000,000

Source: Tourism Research Australia, National Visitor Survey, YE 30 June 2012.

*Tourism to the South Coast - Profile and Statement of Economic Impact
for the year ending 30 June 2012*

The following report has been prepared as a statement of the level of tourism activity for Shoalhaven and Jervis Bay Territory within the South Coast of NSW and the economic impact, in gross terms, on the Region, during 2011-2012. If figures for 2011-2012 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 the South Coast who visits the South Coast 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 30 June 2012

Travel Expenditure by Visitors
ref Tourism Research Australia
Year Ended 30 June 2012
South Coast Domestic - \$121 per night
South Coast Domestic - \$84 per day
Regional NSW Domestic - \$136 per night
Regional NSW Domestic - \$99 per day
South Coast International \$73 per night in the region
South Coast International - \$84 per day (assumed same as domestic)
NSW International \$92 per night in the region
NSW International - \$104 per day (assumed same as domestic)

Year Ending 30th June 2012	Total South Coast (Incl. JBT)	NSW
Number of Domestic Overnight Visitors	3,210,000	24,900,000
Number of Domestic Visitor Nights	11,000,000	84,500,000
Number of Domestic Day Visitors	6,003,000	53,900,000
Expenditure-Domestic Overnight visitors	\$1,331,000,000	\$14,111,500,000
Expenditure by Day Visitors	\$504,252,000	\$5,605,600,000
International Visitors		
Number of Visitors	105,200	2,800,000
Number of Visitor Nights - unreliable data	1,857,000	66,100,000
Number of Day visitors - data not available	0	0
Expenditure by International Overnight Visitors	\$135,561,000	\$6,081,200,000
Expenditure by International Day Visitors	\$0	\$0
Totals	\$1,970,813,000	\$25,798,300,000
Total Expenditure by all Visitors	\$1,971,000,000	\$26,000,000,000

Source: Tourism Research Australia, National Visitor Survey, YE June 2012

Visitor Nights

A visitor night is defined as one person staying for one night within the boundaries of the South Coast.

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.

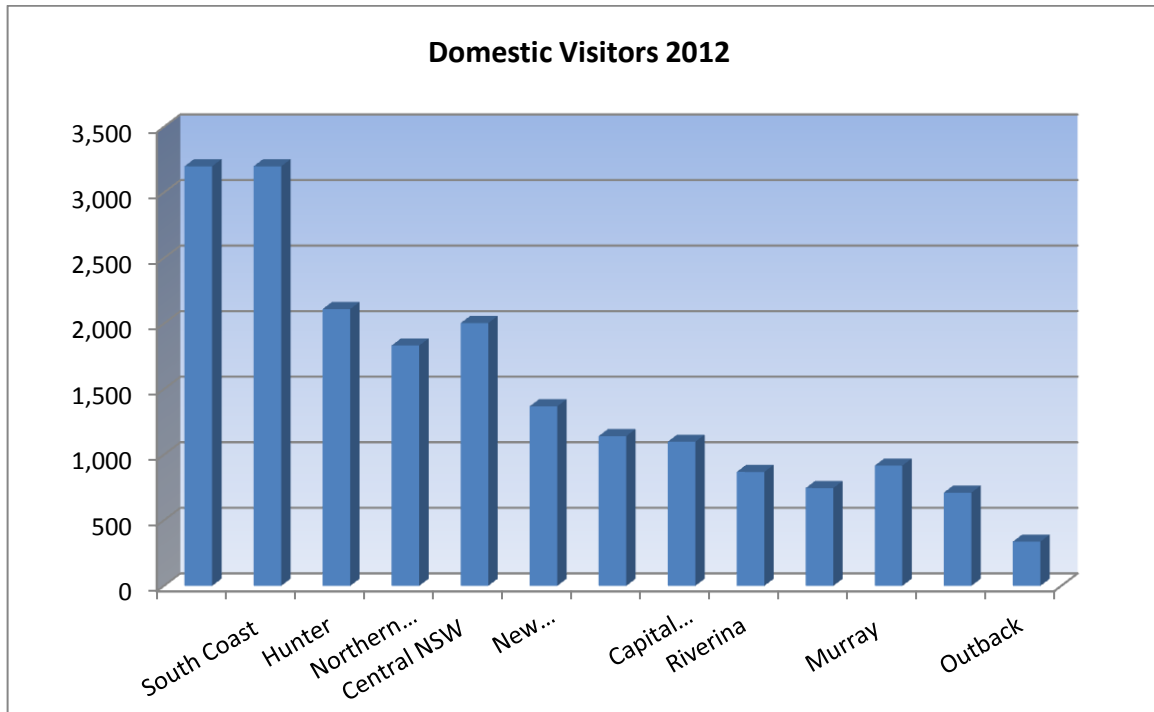
South Coast comparisons with other Regions

	YE June 2012	Visitors (,000)	Visitor Nights (,000)	Day Visitors (,000)	Int'l Visitors (,000)	Int'l Nights (,000)	Tourism expend \$m
	NSW	24,900	84,500	53,900	2,800	66,100	25,798
	Lord Howe Island	n/a	n/a	n/a	n/a	n/a	n/a
1	Sydney	7,900	22,500	19,400	2,600	553,000	13,200
2	Mid North Coast	3,200	12,100	3,777	120	n/a	2,197
3	South Coast	3,200	11,000	6,003	105	1857	1,971
4	Hunter	2,111	5,902	5,436	113	2,425	1,532
5	Northern Rivers	1,833	7,040	3,303	186	1,573	1,497
6	Central NSW	2,004	5,586	2,535	39	838	1,125
7	New England North West	1,369	3,945	1,860	37	n/a	748
8	Central Coast	1,142	3,354	3,254	38	n/a	631
9	Capital Country	1099	2,543	2,626	22	n/a	602
10	Riverina	869	1,993	1,473	20	n/a	562
11	Blue Mountains	746	1,718	2,222	68	n/a	500
12	Murray	917	2,591	1109	21	n/a	471
13	Snowy Mountains	711	3,052	650	15	n/a	468
14	Outback	337	1,072	149	12	n/a	180

Source: Tourism Research Australia, National Visitor Survey, YE June 2012.

Domestic Visitors - Regions in NSW

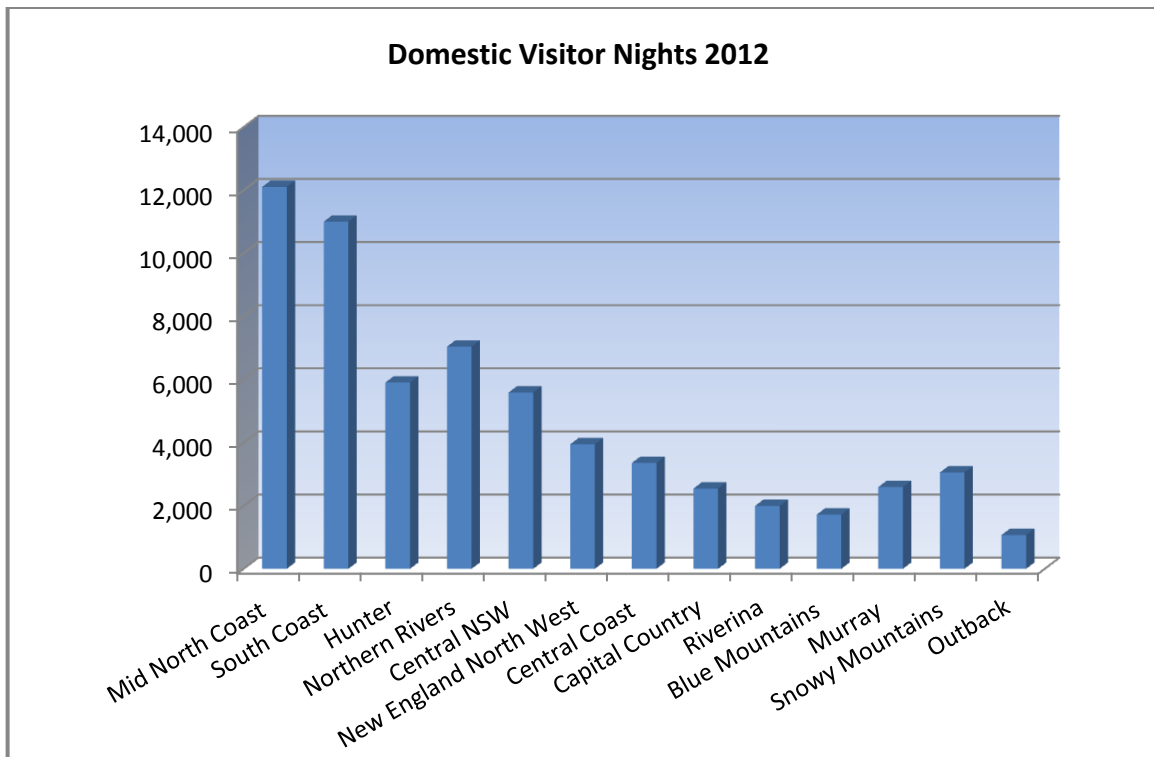
	Region for YE June 2012	Domestic Visitors '000
1	Sydney	7,900
2	Mid North Coast	3,200
3	South Coast	3,200
4	Hunter	2,111
5	Northern Rivers	1,833
6	Central NSW	2,004
7	New England North West	1,369
8	Central Coast	1,142
9	Capital Country	1099
10	Riverina	869
11	Blue Mountains	746
12	Murray	917
13	Snowy Mountains	711
14	Outback	337



Source: Tourism Research Australia, National Visitor Survey, YE June 2012.

Domestic Visitor Nights - Regions in NSW

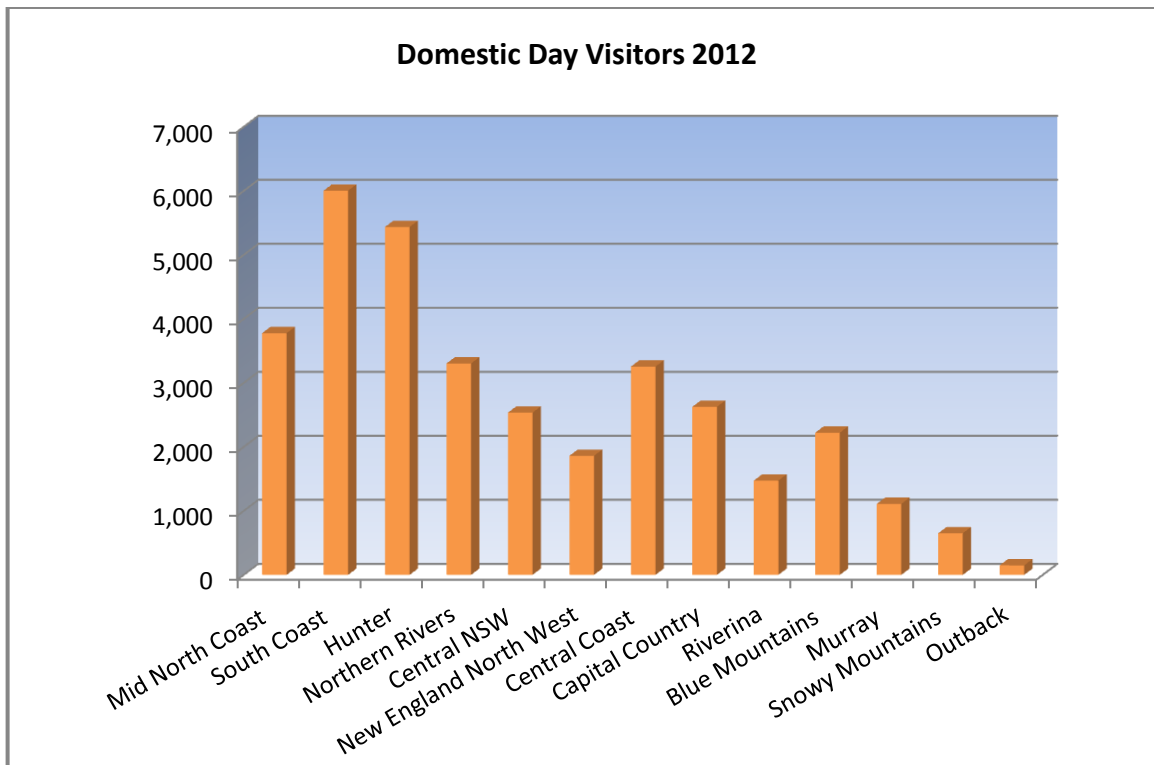
	Region for YE Jun 2012	Visitor Nights '000
1	Sydney	22,500
2	Mid North Coast	12,100
3	South Coast	11,000
4	Hunter	5,902
5	Northern Rivers	7,040
6	Central NSW	5,586
7	New England North West	3,945
8	Central Coast	3,354
9	Capital Country	2,543
10	Riverina	1,993
11	Blue Mountains	1,718
12	Murray	2,591
13	Snowy Mountains	3,052
14	Outback	1,072



Source: Tourism Research Australia, National Visitor Survey, YE June 2012.

Day Visitors - Regions in NSW

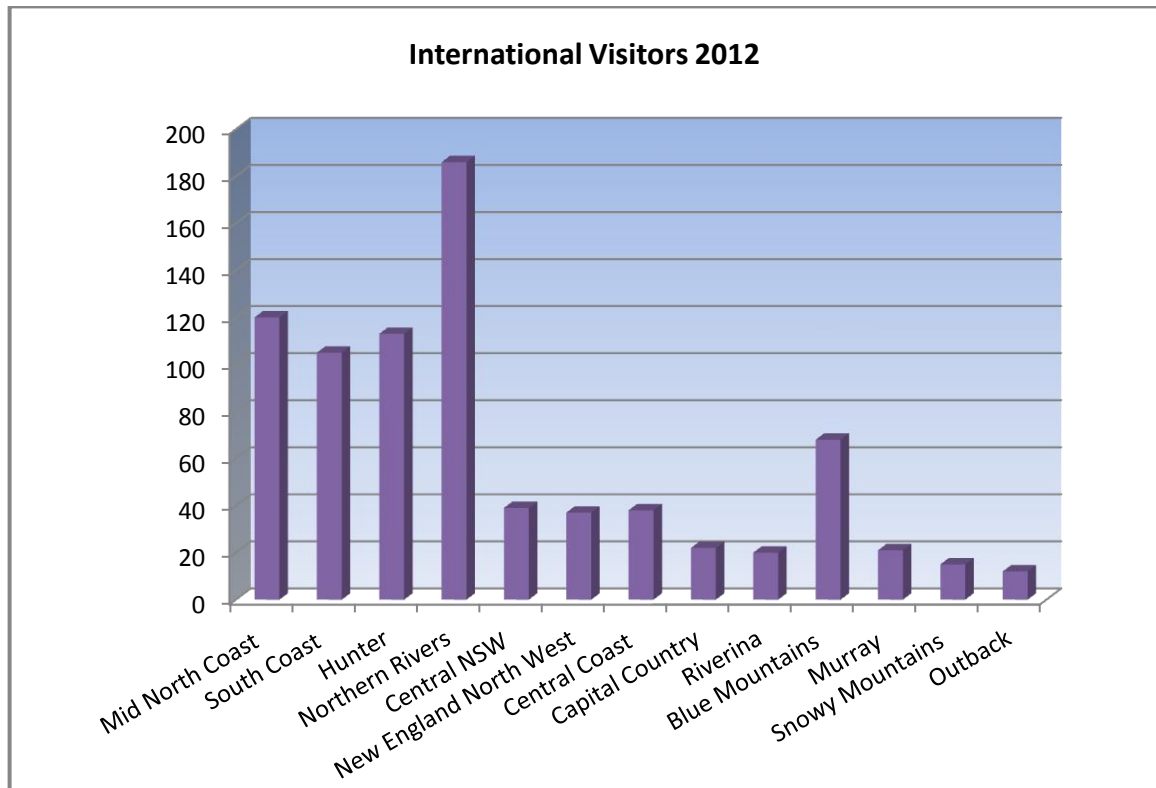
	Region YE Jun 2012	Day Visitors (,000)
1	Sydney	19,400
2	Mid North Coast	3,777
3	South Coast	6,003
4	Hunter	5,436
5	Northern Rivers	3,303
6	Central NSW	2,535
7	New England North West	1,860
8	Central Coast	3,254
9	Capital Country	2,626
10	Riverina	1,473
11	Blue Mountains	2,222
12	Murray	1,109
13	Snowy Mountains	650
14	Outback	149



Source: Tourism Research Australia, National Visitor Survey, YE June 2012.

International Visitors - Regions in NSW

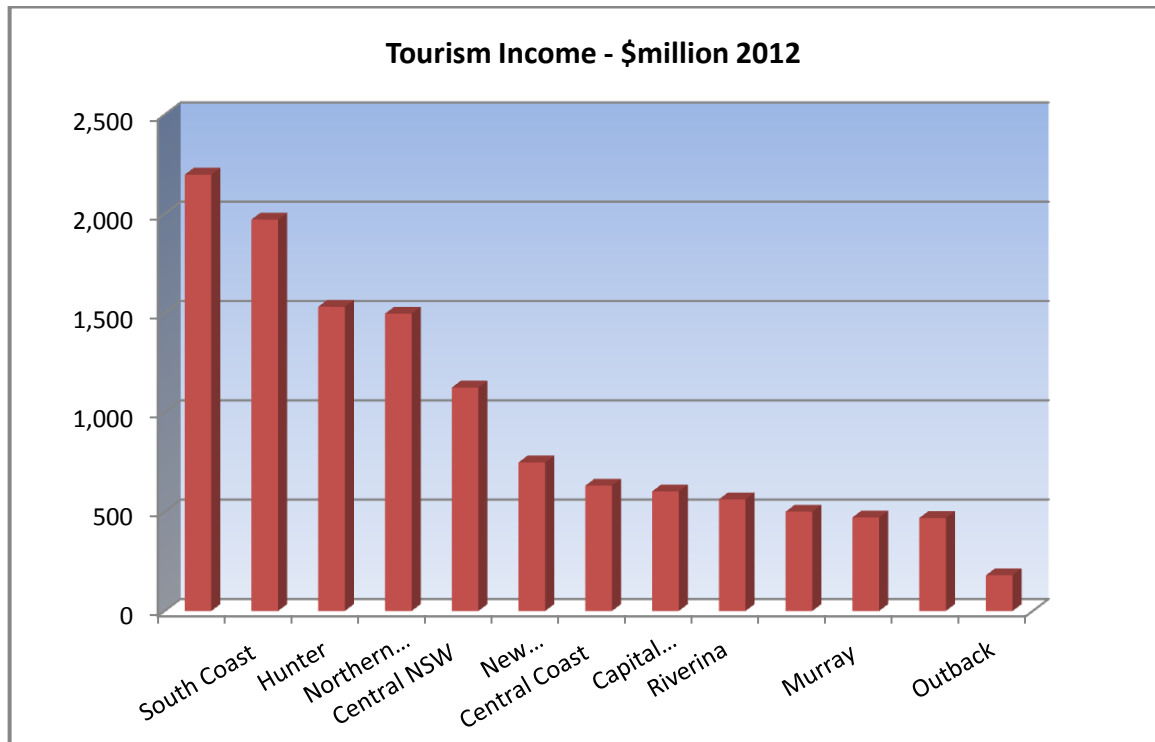
	Region YE Jun 2012	Int'l Visitors (,000)
1	Sydney	2,600
2	Mid North Coast	120
3	South Coast	105
4	Hunter	113
5	Northern Rivers	186
6	Central NSW	39
7	New England North West	37
8	Central Coast	38
9	Capital Country	22
10	Riverina	20
11	Blue Mountains	68
12	Murray	21
13	Snowy Mountains	15
14	Outback	12



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

Tourism Income – Regions – 2011

	Region for YE June 2012	Tourism expend \$m
1	Sydney	13,200
2	Mid North Coast	2,197
3	South Coast	1,971
4	Hunter	1,532
5	Northern Rivers	1,497
6	Central NSW	1,125
7	New England North West	748
8	Central Coast	631
9	Capital Country	602
10	Riverina	562
11	Blue Mountains	500
12	Murray	471
13	Snowy Mountains	468
14	Outback	180



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

South Coast Tourism Profile

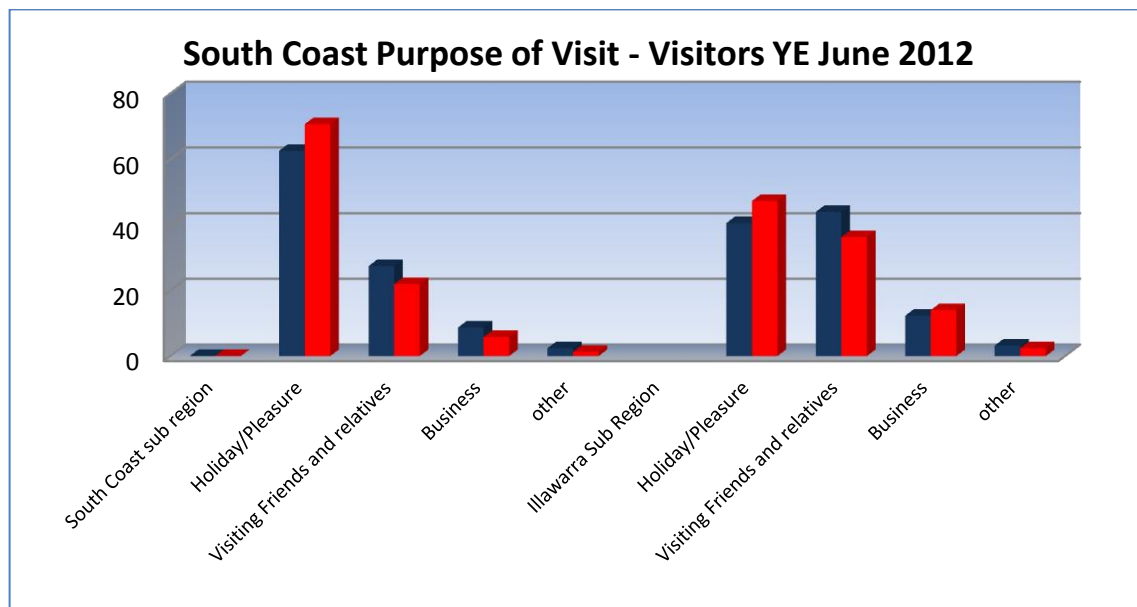
The South Coast of New South Wales is made up of Wollongong City, Shellharbour City, Kiama Municipality, Shoalhaven City, Jervis Bay Territory, Eurobodalla Shire and Bega Valley Shire. Geographically it stretches from Helensburgh in the North to Eden in the South.

The Illawarra Sub region is made up of Wollongong City, Shellharbour City and Kiama Municipality. The South Coast Sub Region is made up of Shoalhaven City, Jervis Bay Territory, Eurobodalla Shire and Bega Valley Shire.

The following is extracted from the South Coast Region and Illawarra Region Tourism Profiles, year ending 30th June 2012. Prepared by Destination New South Wales from figures supplied by Tourism Research Australia. The full documents are available on request or can be download from Destination NSW's web site.

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

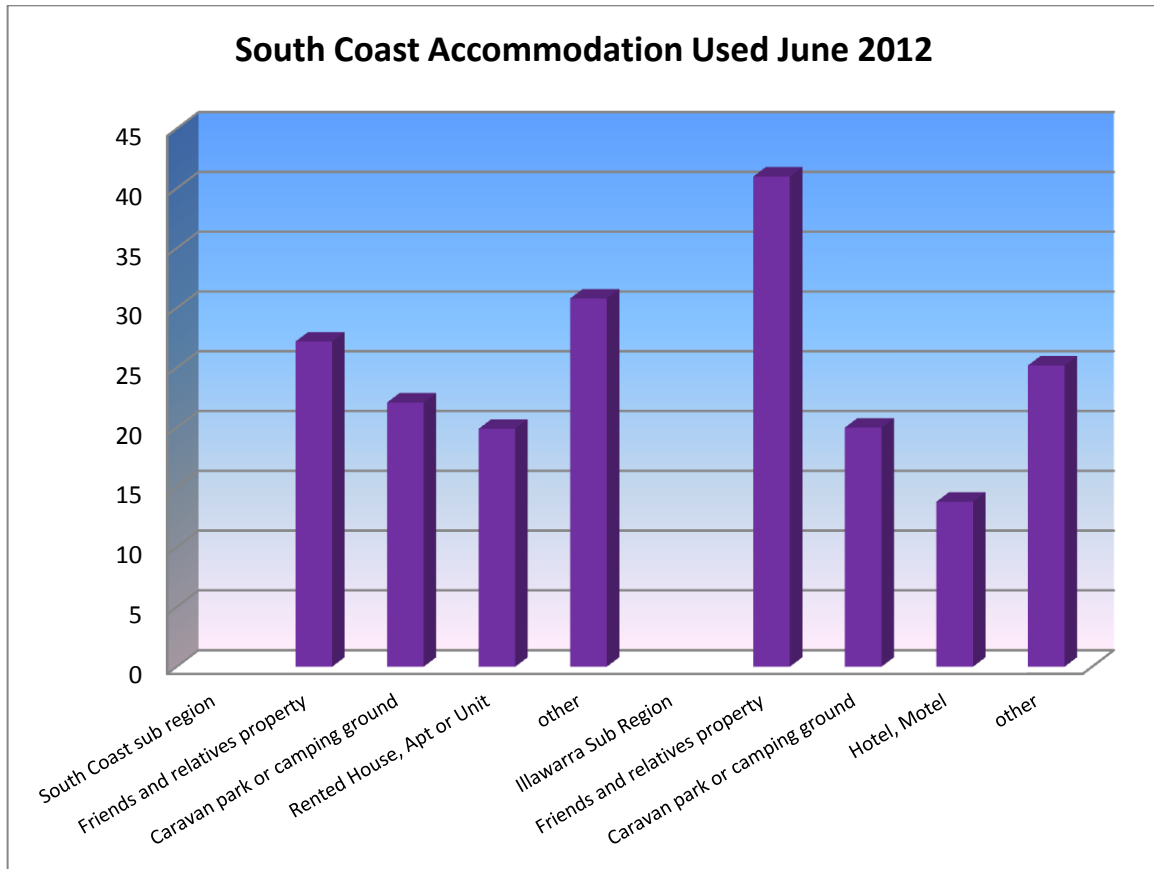
South Coast Purpose of Visit - Visitors YE June 2012		
	%	%
South Coast sub region	Visitors	Nights
Holiday/Pleasure	62.5	70.6
Visiting Friends and relatives	27.4	21.9
Business	8.7	5.8
other	2.4	1.3
Illawarra Sub Region		
Holiday/Pleasure	40.5	47.2
Visiting Friends and relatives	43.9	36.2
Business	12.3	14.0
other	3.2	2.4



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

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

South Coast Accommodation Used June 2012	
South Coast sub region	%
Friends and relatives property	27.2
Caravan park or camping ground	22.1
Rented House, Apt or Unit	19.9
other	30.8
Illawarra Sub Region	%
Friends and relatives property	41.0
Caravan park or camping ground	20.0
Hotel, Motel	13.8
other	25.2



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

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

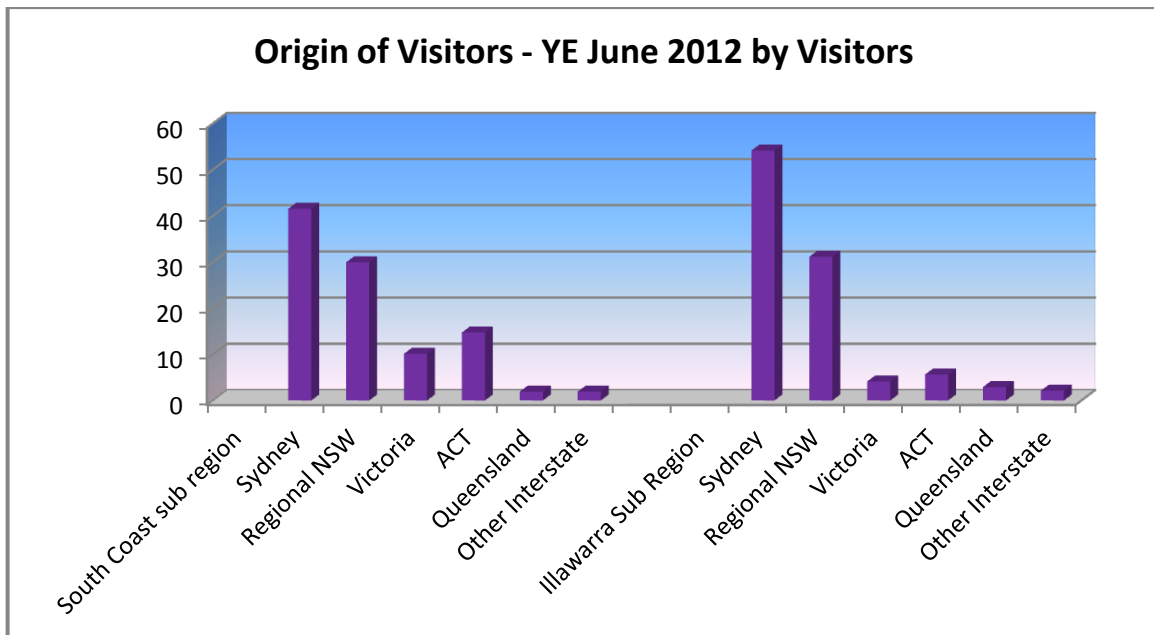
During 2009 the average length of stay was 3.5 nights.

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

	Domestic	international
South Coast (incl Educational within Wollongong City)	3.5 nights	16.4 nights

From where do our Visitors come?

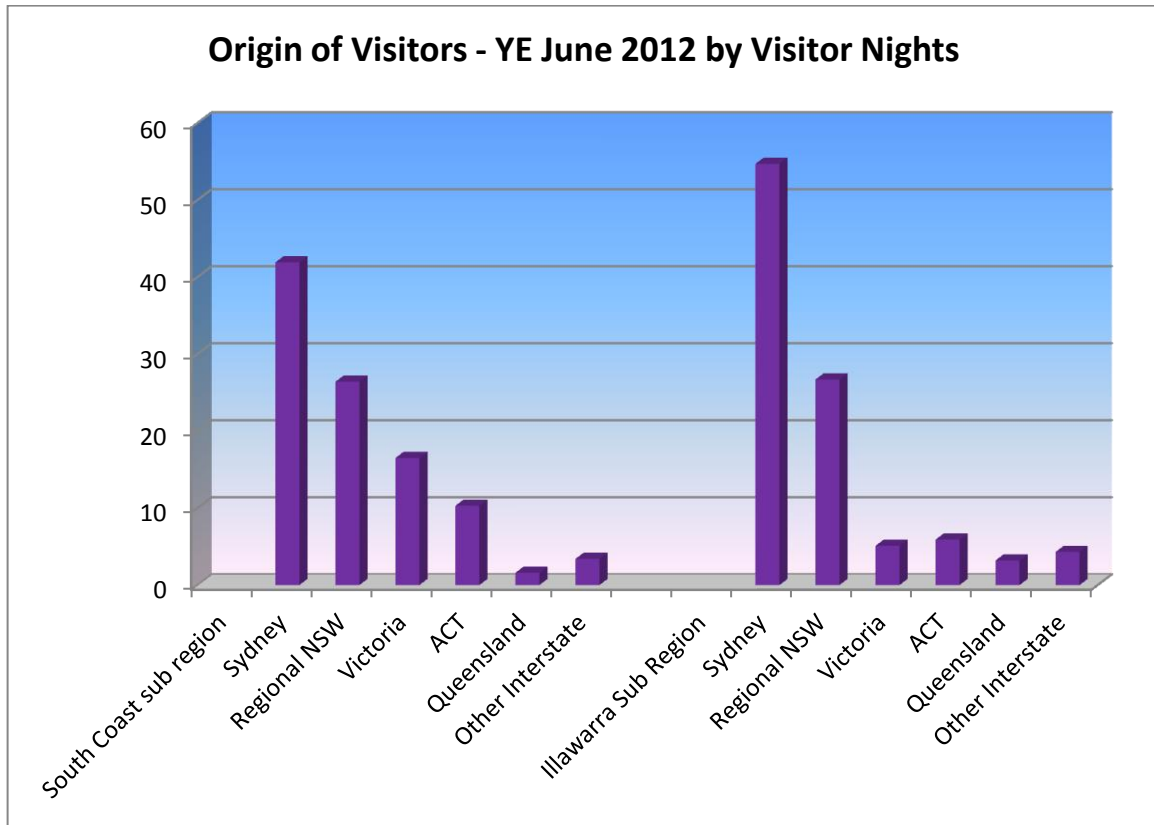
<i>Where do our Visitors come from</i>	
Origin of Visitors - YE June 2012 by Visitors	%
South Coast sub region	
Sydney	41.5
Regional NSW	29.9
Victoria	10.1
ACT	14.7
Queensland	1.9
Other Interstate	1.9
Illawarra Sub Region	
Sydney	54.1
Regional NSW	31.1
Victoria	4.1
ACT	5.6
Queensland	2.9
Other Interstate	2.1



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

*Tourism to the South Coast - Profile and Statement of Economic Impact
for the year ending 30 June 2012*

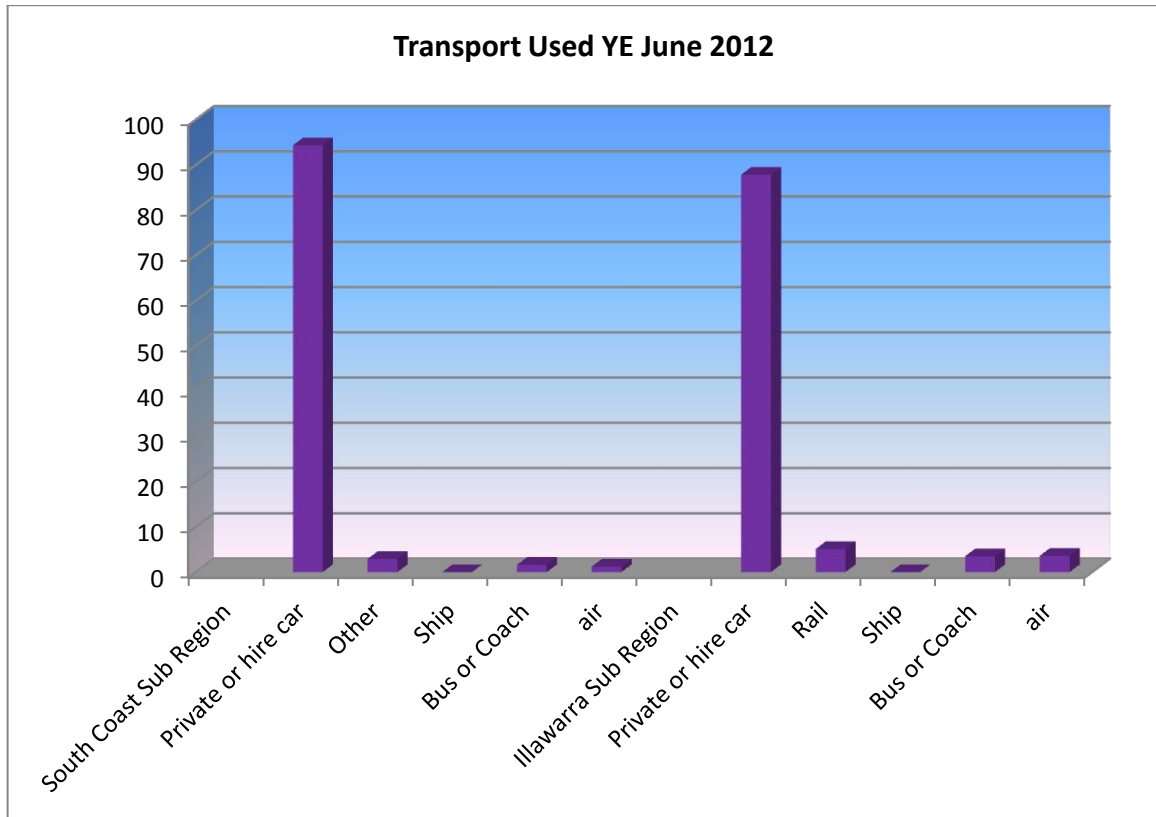
Origin of Visitors - YE June 2012 by Visitor Nights	%
South Coast sub region	
Sydney	41.9
Regional NSW	26.4
Victoria	16.5
ACT	10.3
Queensland	1.6
Other Interstate	3.4
Illawarra Sub Region	
Sydney	54.7
Regional NSW	26.7
Victoria	5.1
ACT	5.9
Queensland	3.2
Other Interstate	4.3



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

What Transport Do Our Visitors Use?

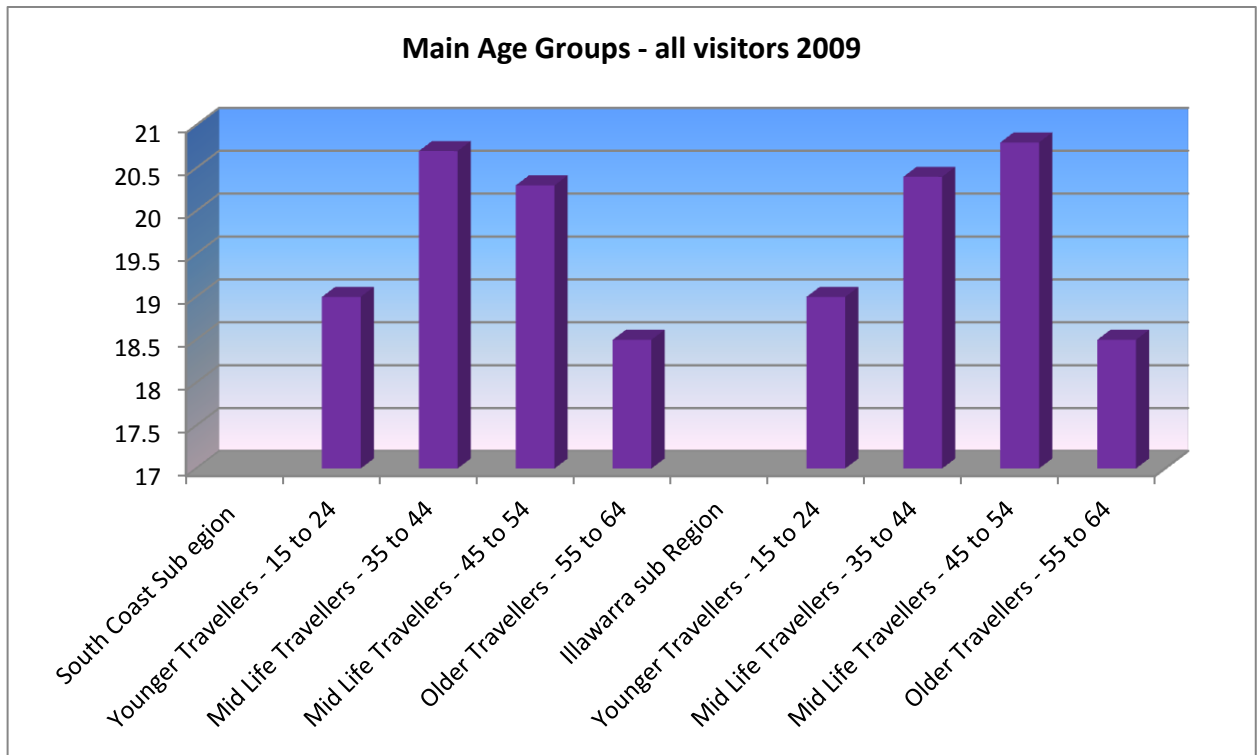
What Transport Do Our Visitors Use?	
	%
Transport Used YE June 2012	
South Coast Sub Region	
Private or hire car	94.3
Other	2.9
Ship	0.0
Bus or Coach	1.6
air	1.2
Illawarra Sub Region	
Private or hire car	87.8
Rail	5.1
Ship	0.0
Bus or Coach	3.5
air	3.6



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

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

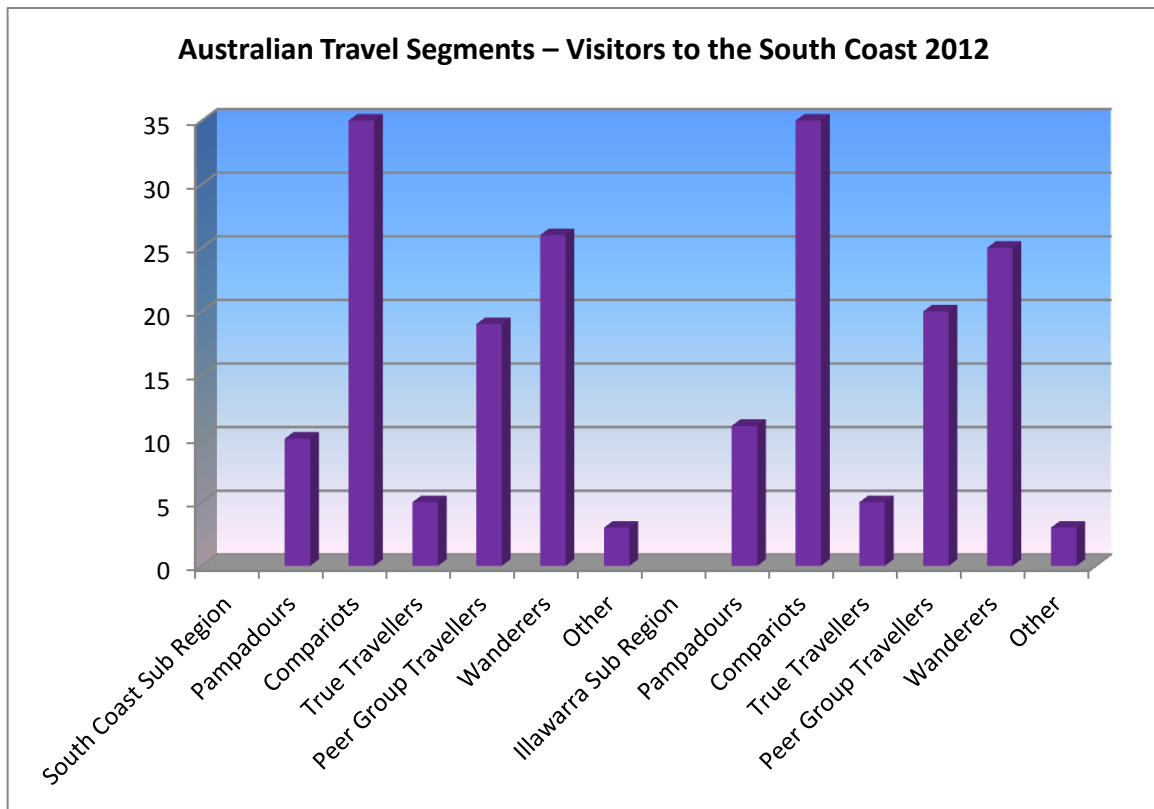
Main Age Groups - all visitors 2009	
South Coast Sub region	%
Younger Travellers - 15 to 24	19.0
Mid Life Travellers - 35 to 44	20.7
Mid Life Travellers - 45 to 54	20.3
Older Travellers - 55 to 64	18.5
Illawarra sub Region	
Younger Travellers - 15 to 24	19.0
Mid Life Travellers - 35 to 44	20.4
Mid Life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



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

Travel Segments / Demographics

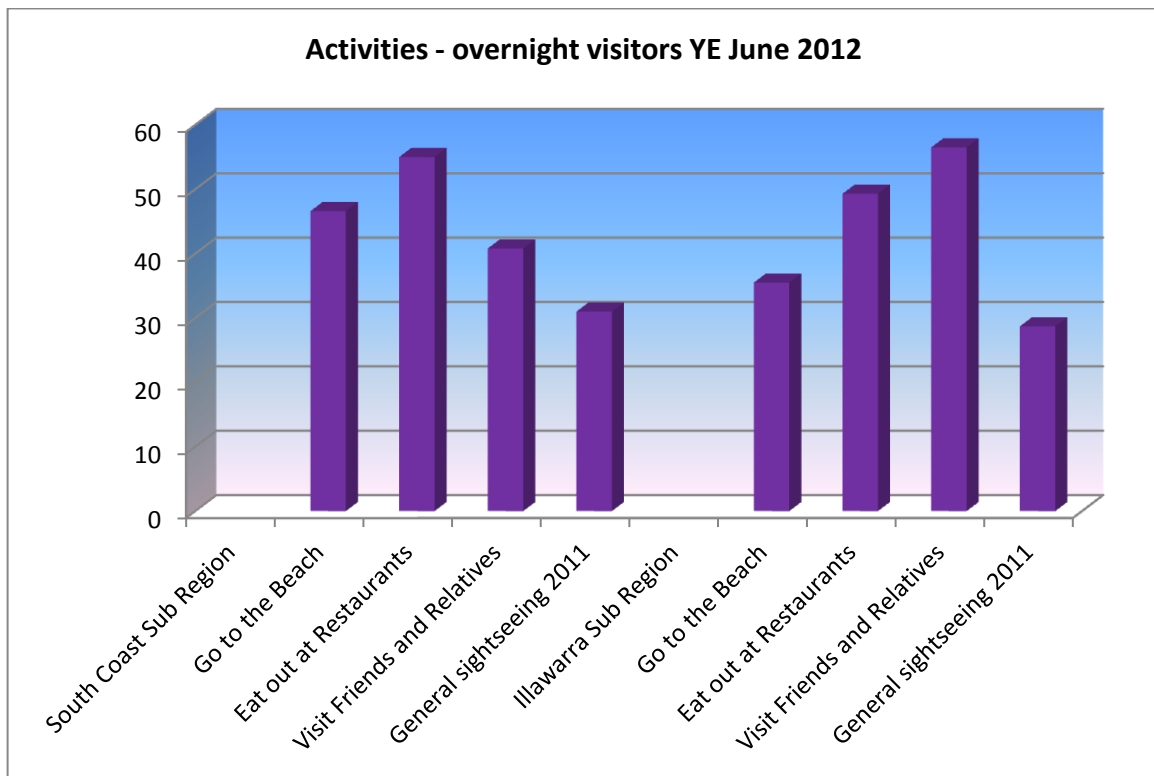
Australian Travel Segments – Visitors to the South Coast	
YE June 2012	%
South Coast Sub Region	
Pampadours	10.0
Compariots	35.0
True Travellers	5.0
Peer Group Travellers	19.0
Wanderers	26.0
Other	3.0
Illawarra Sub Region	
Pampadours	11.0
Compariots	35.0
True Travellers	5.0
Peer Group Travellers	20.0
Wanderers	25.0
Other	3.0



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

Preferred Activities of Visitors – South Coast 2012

Activities - overnight visitors YE June 2012	%
South Coast Sub Region	
Go to the Beach	46.6
Eat out at Restaurants	55.0
Visit Friends and Relatives	40.8
General sightseeing 2011	31.0
Illawarra Sub Region	
Go to the Beach	35.5
Eat out at Restaurants	49.3
Visit Friends and Relatives	56.5
General sightseeing 2011	28.7



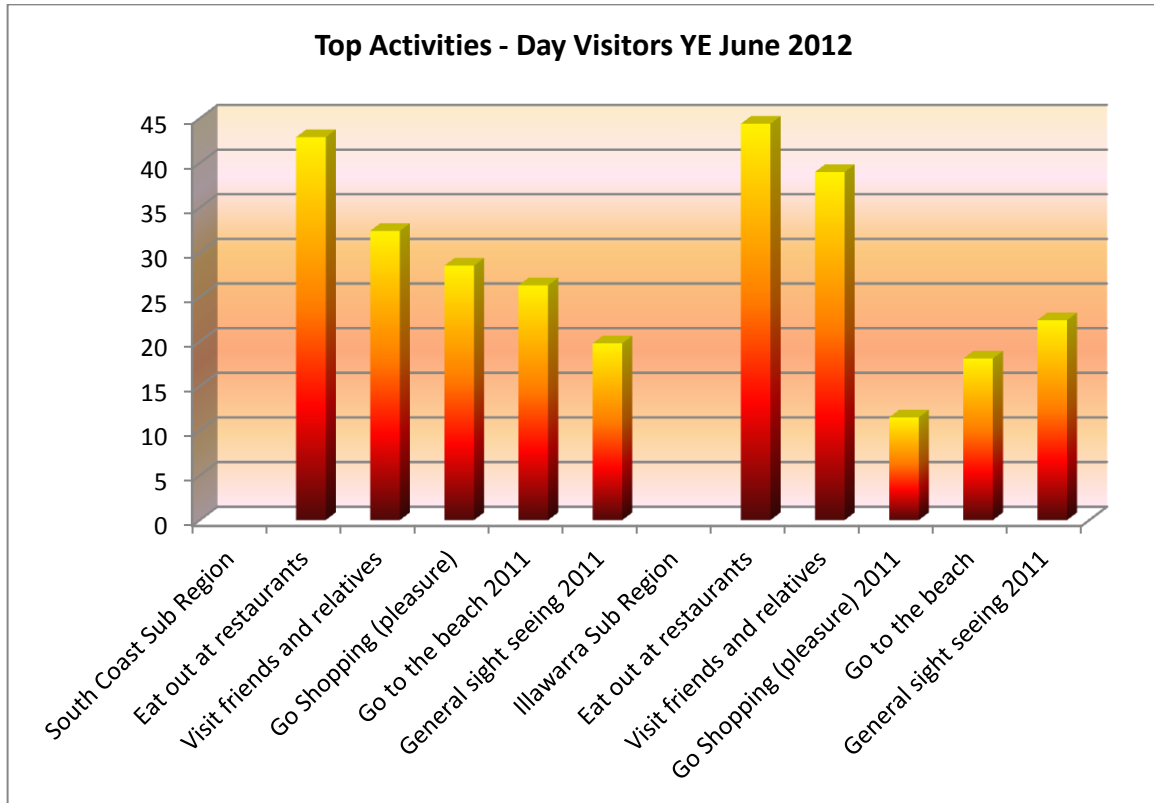
Source: Tourism Research Australia, National Visitor Survey, YE June 2011 and YE June 2012

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 South Coast and secondly they represent a potential to be converted into visitor nights hence securing a higher expenditure per head

Preferred Activities of Day Visitors - 2012

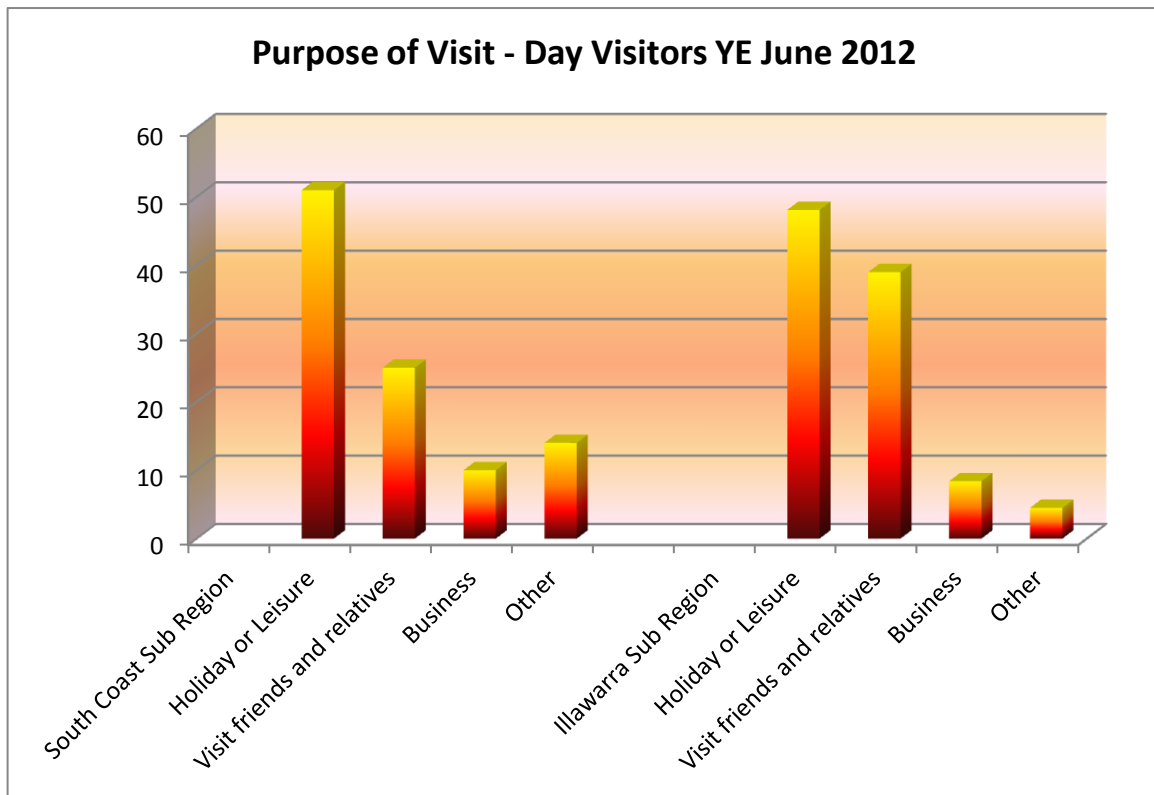
Top Activities - Day Visitors YE June 2012	%
South Coast Sub Region	
Eat out at restaurants	42.9
Visit friends and relatives	32.4
Go Shopping (pleasure)	28.5
Go to the beach 2011	26.3
General sight seeing 2011	19.8
Illawarra Sub Region	
Eat out at restaurants	44.4
Visit friends and relatives	39.0
Go Shopping (pleasure) 2011	11.5
Go to the beach	18.1
General sight seeing 2011	22.4



. Source: Tourism Research Australia, National Visitor Survey, YE June 2011 and YE June 2012

Purpose Of Visit – Day Visitors

Purpose of Visit - Day Visitors YE June 2012	%
South Coast Sub Region	
Holiday or Leisure	51.0
Visit friends and relatives	25.0
Business	10.0
Other	14.0
Illawarra Sub Region	
Holiday or Leisure	48.1
Visit friends and relatives	39.0
Business	8.4
Other	4.5



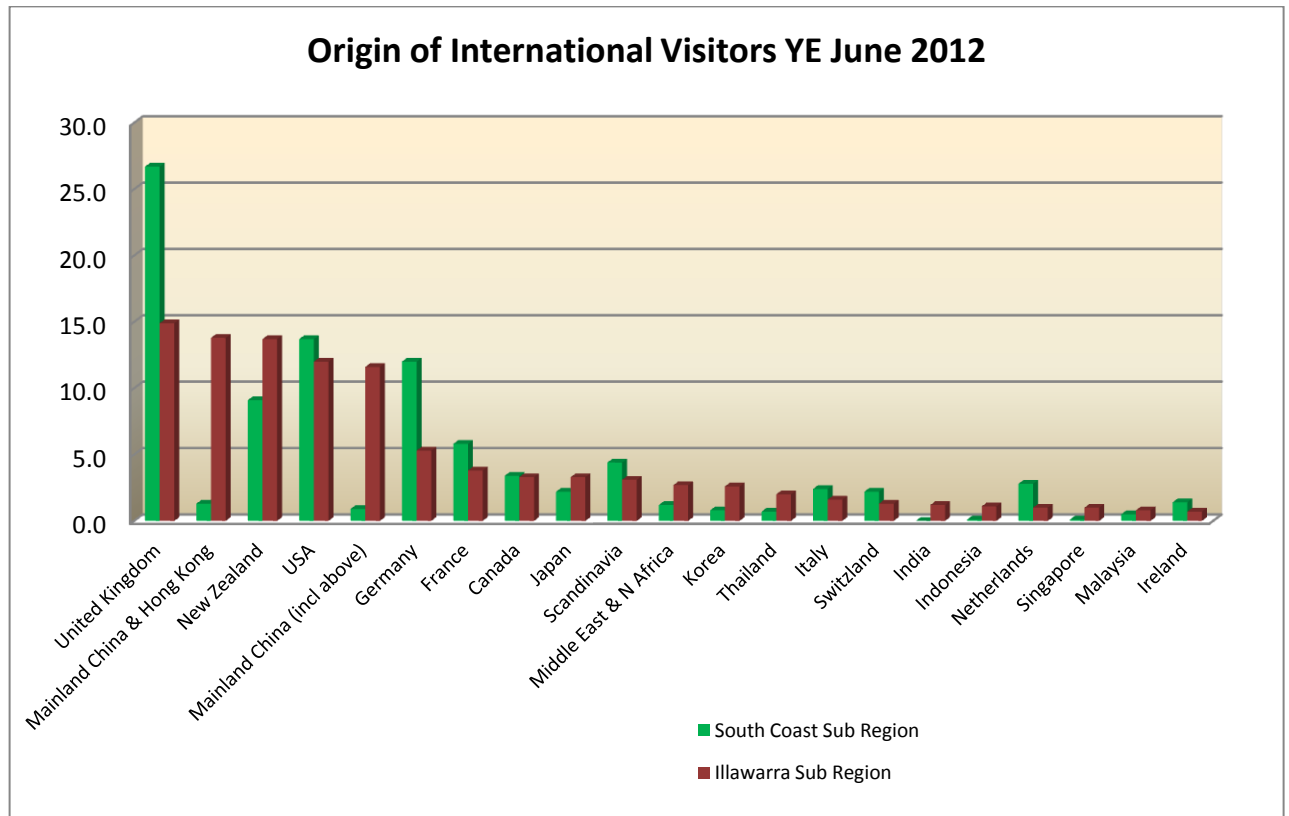
Source: Tourism Research Australia, National Visitor Survey, YE June 2012

International Visitors to the South Coast Region

Origin of International Visitors to the South Coast Region

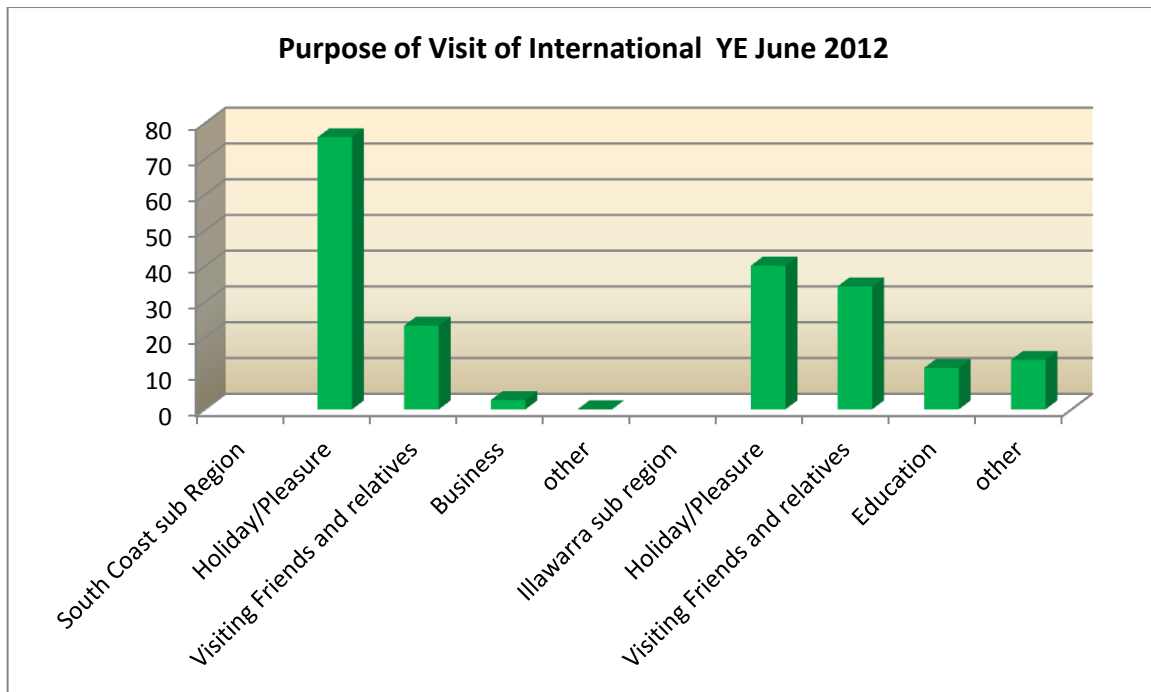
Source: Tourism Research Australia, National Visitor Survey, YE June 2012

Origin of International Visitors YE June 2012	South Coast Sub Region	Illawarra Sub Region
United Kingdom	26.7	14.9
Mainland China & Hong Kong	1.3	13.8
New Zealand	9.1	13.7
USA	13.7	12.0
Mainland China (incl above)	0.9	11.6
Germany	12.0	5.3
France	5.8	3.8
Canada	3.4	3.3
Japan	2.2	3.3
Scandinavia	4.4	3.1
Middle East & N Africa	1.2	2.7
Korea	0.8	2.6
Thailand	0.7	2.0
Italy	2.4	1.6
Switzerland	2.2	1.3
India	0.7	1.2
Indonesia	0.1	1.1
Netherlands	2.8	1.0
Singapore	0.1	1.0
Malaysia	0.5	0.8
Ireland	1.4	0.7



Purpose of Visit of International YE June 2012

<i>Purpose of Visit of International YE June 2012</i>	
Visitors to the South Coast	%
South Coast sub Region	
Holiday/Pleasure	76.1
Visiting Friends and relatives	23.4
Business	2.6
other	0.0
Illawarra sub region	
Holiday/Pleasure	40.2
Visiting Friends and relatives	34.4
Education	11.6
other	13.8



Source: Tourism Research Australia, National Visitor Survey, YE June 2012

*Tourism to the South Coast - Profile and Statement of Economic Impact
for the year ending 30 June 2012*

Accommodation Used - International Visitors 2012	
	%
South Coast Sub Region	
Home of a Friend or Relative	59.9
Hotel, Motel (2009)	11.8
Caravan Park (2009)	13.6
Other Incl rented house or unit	14.7
Illawarra Sub Region	
Home of a Friend or Relative	26.3
Educational Institution (2009)	15.2
Rented house, apartment, unit	53.3
Other incl Caravan Park	5.2



Source: Tourism Research Australia, National Visitor Survey, YE June 2009 and 2012