

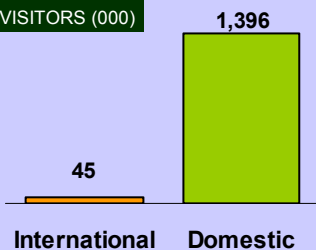
## VALUE OF TOURISM IN WINGECARRIBEE LGA

- Each year, around 1.4 million tourists visit the Wingecarribee Shire
- Each year, these visitors spend around \$170million in the Shire
- This expenditure supports around 2000 full time equivalent Wingecarribee jobs

➤ These job numbers almost certainly make Tourism the **LARGEST** employer in the Wingecarribee.

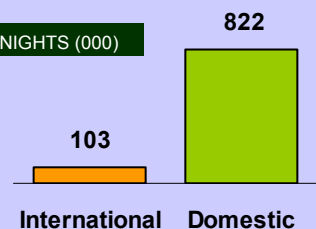
## OUR VISITOR PROFILE— VISITORS, NIGHTS AND SPENDING

VISITORS (000)



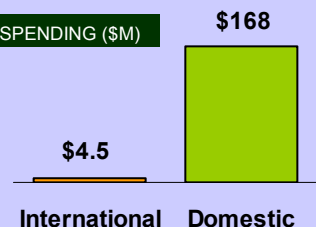
- The total number of visitors that come to the Wingecarribee Shire each year is approximately 1.4 million.
- Most visitors are domestic visitors (ie Australians traveling within Australia). Approximately 345,000 domestic overnight visitors and 1.1million domestic day visitors come to the Wingecarribee Shire each year.
- An estimated 7,000 international visitors stay overnight in the Wingecarribee Shire each year. Estimates for the number international day visitors are not typically available, however the best available estimate is around 40,000 per year.

NIGHTS (000)



- The total number of nights spent by visitors to the Wingecarribee Shire each year is close to 1million (925,000).
- Most OVERNIGHT visitors are domestic visitors. In an average year, over 800,000 nights are spent in the Wingecarribee Shire by domestic visitors and 100,000 by international visitors.

SPENDING (\$M)

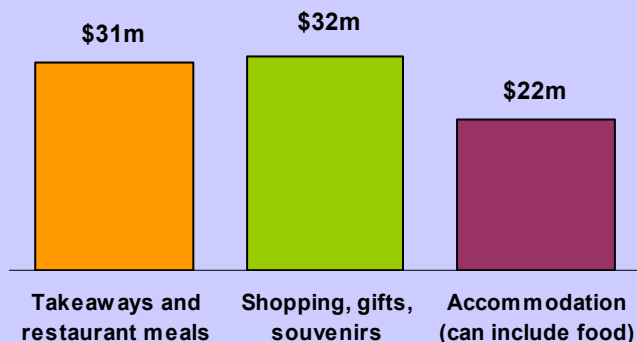


- Each year, visitors spend around \$170 million dollars in the Wingecarribee Shire. This amount does not count spending by international day visitors so the actual amount would be higher.
- Domestic OVERNIGHT visitors account for most of the spending: in an average year these visitors spend close to \$90million in the Wingecarribee Shire. Domestic DAY visitors spend around \$80million in the Shire each year.
- International OVERNIGHT visitors account for around \$4.5m of the total visitor spending. Unfortunately, it is not currently possible to estimate the spending of international day visitors in the Wingecarribee.

## SPENDING THROUGHOUT THE LOCAL ECONOMY—DOMESTIC VISITORS

*Note: these amounts are spending estimates by domestic visitors for which the Wingecarribee Shire was the only trip destination. Spending by those who visited the Wingecarribee Shire AND other LGAs is not included, nor is expenditure by international visitors.*

CATEGORY SPENDING—DOMESTIC VISITORS (\$m)



- AROUND \$31m on Takeaways and Restaurant Meals is spent in the Wingecarribee each year by domestic visitors
- AROUND \$32m+ on Shopping, Gifts and Souvenirs is spent in the Wingecarribee each year by domestic visitors
- AROUND \$22m on Accommodation is spent in the Wingecarribee each year by domestic visitors

PLUS: Multi-million dollar annual expenditures are also made in categories such as Alcohol/drinks and Groceries.

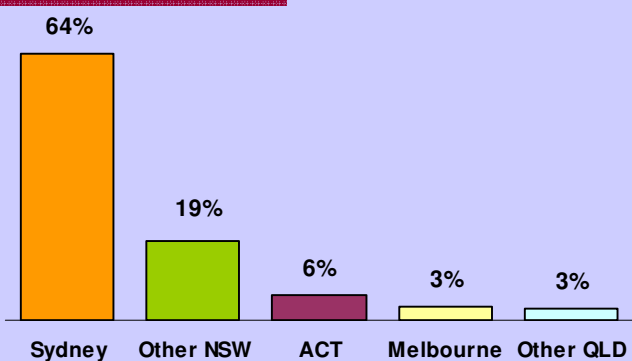
Data Sources: Tourism Research Australia; National Visitor Survey 1998-2006; International Visitor Survey 1999-2006; Expenditure by Visitors in Australia's Tourism Regions 1999-2006; Department of Industry Tourism & Resources, Tourism Economic Impact Model for Australian Local Government (2006)

Notes and cautions: Estimates are annual average estimates and are subject to sample error and modeling assumptions. They should be considered as best available estimates. Additional information should be sought from the data source providers and TSH concerning the nature of and strengths and weaknesses of the estimates and assumptions.

# WINGECARRIBEE DOMESTIC VISITOR PROFILE

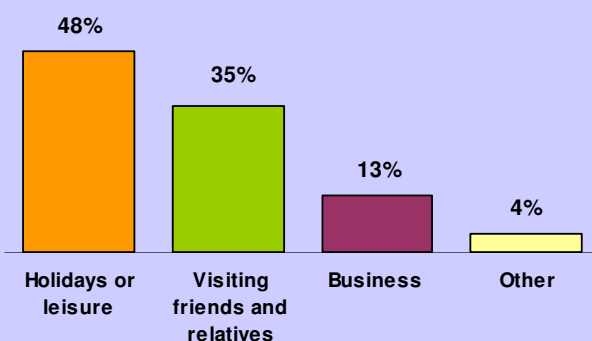
## KEY CHARACTERISTICS OF DOMESTIC OVERNIGHT VISITORS TO THE WINGECARRIBEE LGA

### WHERE THEY COME FROM



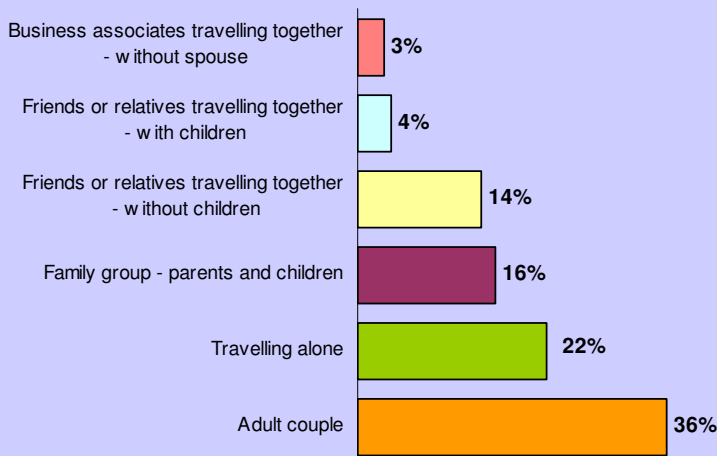
- The vast majority of domestic overnight visitors that come to the Wingecarribee Shire come from Sydney and close surrounds. These visitors typically account for almost two-thirds of all domestic overnight visitors
- The combined areas that make up Regional NSW account for almost 20%. Overnight visitors contribute 6% on average.
- Melbourne and Regional Qld each account for 3% of visitors in a typical year
- Specific Regions in NSW stand out as more significant than others. These are: the South Coast, Illawarra Region, Central Coast, Hunter Region, North Coast NSW and Explorer Country. Each account for between 2% and 3% of the total
- Areas that do not appear on this chart contribute less than 2% and are not shown given the high sample survey error associated with such small numbers.

### PURPOSE OF TRIP



- Almost half (48%) of domestic overnight visitors that come to the Wingecarribee Shire visit for Holiday/Leisure reasons
- Just over one third (35%) visit the Shire with Visiting Friends or Relatives as the main purpose of the trip
- Business visitors make up a further 13% and remaining purposes combined (Other) a further 4%
- Deeper profiling reveals that Visiting Relatives accounts for approximately twice the portion Visiting Friends (23% vs 12%)
- Deeper analysis of the "Business" and "Other" categories reveals that participation in sport accounts for around 3.5% of visitors and attending Conferences, exhibitions, conventions or trade-fairs approximately 2.5% of the total

### TRAVEL PARTY TYPE



- The main type of travel party of domestic overnight visitors is "Adult Couple—in a relationship sense). These account for over two thirds of the total (36%)
- The second largest type of travel party is solo travelers (ie "Traveling Alone"). These account for around one fifth of the total
- All other travel party types contribute 16% or less
- Family Groups (parents and children) and Friends %r Relatives traveling together (without children) account for 16% and 14% of the total respectively
- Other types of travel party are relatively insignificant compared to

### AGE

Viewed in age groups of 5 years, the most significant age group is 50-54 years (12% of total) followed by closely by 35-39 years (11%). Most other age groups contribute around 8% each with the exception of the below 30 years groups (15-19, 20-24, 25-29) which each contribute approximately 6.5% to the total

### GENDER

Females clearly account for more visitors than males (56% vs 44%)

### LIFECYCLE

Older non-working married persons are the most significant visitor type when broken down into lifecycle segments (accounting for 18% of total visitors respectively). Older working married persons, Parents with youngest child aged 6-14 and Parents with youngest child aged 5 or less each account for 12%. Young/midlife couple, no kids account for 10%.

### DESTINATIONS

Eight out of ten domestic overnight visitors to the Wingecarribee are only visiting the Wingecarribee on their trip

### MONTH VISITED

April stands out as the peak month of visit (12%) followed by January (10%) and November (9%). The quietest months are December (just under 6%) and February (6.5%). Most other months account for around 8% of the visitor total.

### ACTIVITIES

Eating out at restaurants is the most popular activity with almost 4 in ten visitors participating in this activity. General sightseeing (33%) and Shopping (21%) are the next most significant with the exception of Visiting Friends/Relatives (36%). Pubs/Clubs (12%) and Bushwalking or rainforest walks (11%) along with Visiting National/State Parks (11%) are also above the 10% mark

**Data Source:** Tourism Research Australia; National Visitor Survey 1998-2006. Source should be sighted in all referencing.

**Notes and cautions:** Estimates are annual average estimates for the years 1998-2006. They should be considered as estimates and are subject to sample error and other survey limitations. Business and other decisions should not be made on the basis of these estimates alone.

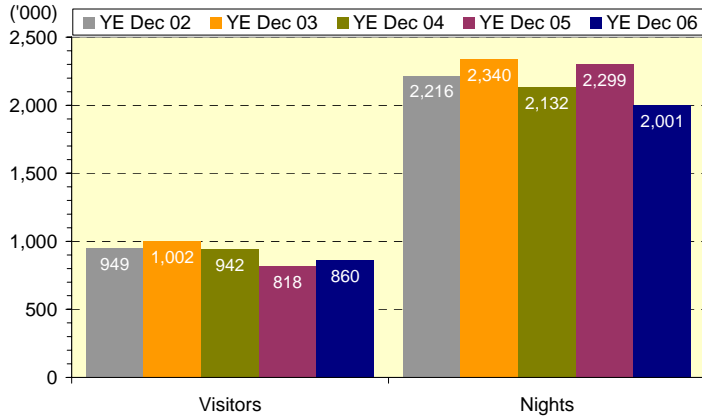


Total visitors ('000)	2,546
Domestic nights ('000)	2,001
Total expenditure (\$m)	\$351

### Domestic Overnight Travel

Note: The number of trips taken domestically by Australians increased by 5.2 percent on last year, but was down by 2.4 percent compared to four years ago.

#### Visitors and nights

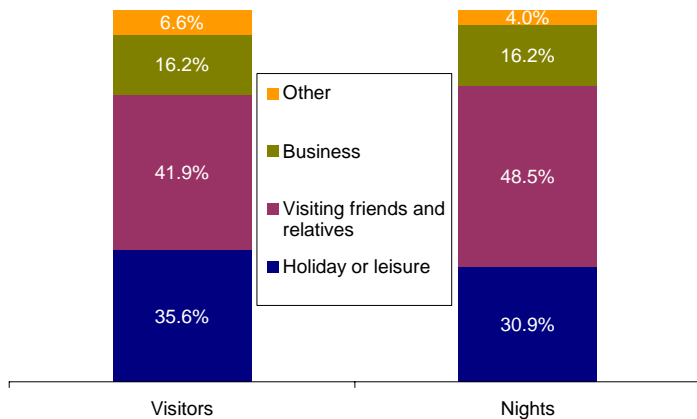


The region received nearly 0.9 million domestic overnight visitors - up by 5.1% on YE Dec 05. Visitors spent over 2.0 million nights in the region - down by 13.0% on YE Dec 05.

#### Market share

The region received 4.9% of visitors to and 3.2% of nights in Regional NSW. Compared to YE Dec 05, the share of visitors was up by 0.1% point and share of nights was down by 0.6% points.

#### Purpose of visit



**Visitors** - 'Visiting friends and relatives' (41.9%) was the largest purpose for visitors to the region. 'Holiday or leisure' (35.6%) was the 2<sup>nd</sup> largest, followed by 'Business' (16.2%).

**Nights** - 'Visiting friends and relatives' (48.5%) was the largest purpose in terms of nights in the region. 'Holiday or leisure' (30.9%) was the 2<sup>nd</sup> largest, followed by 'Business' (16.2%).

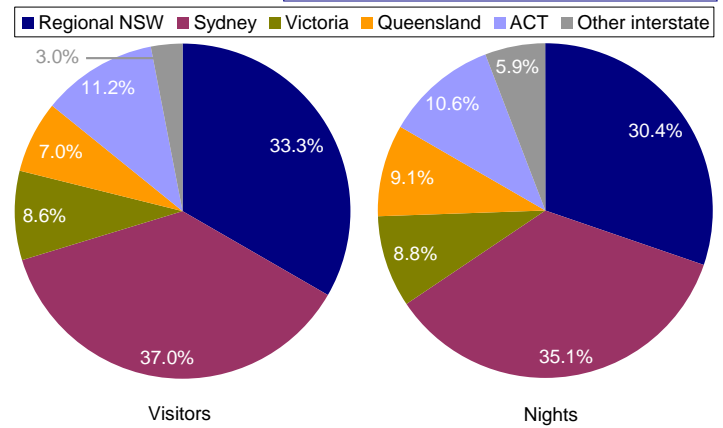
#### Accommodation

Over 1/2 (51.1%) of nights in the region were spent in 'Friends or relatives property'. 'Standard hotel, motor inn, below 4 star' (18.1%) was the 2<sup>nd</sup> most popular, followed by 'Caravan park or commercial camping ground' (5.9%).

#### Activities

Over 2/5 (44.0%) of visitors to the region 'Visited friends and relatives'. 'Eat out at restaurants' (42.5%) was the 2<sup>nd</sup> most popular activity, followed by 'General sight seeing' (22.6%) and 'Go shopping' (20.2%).

#### Origin



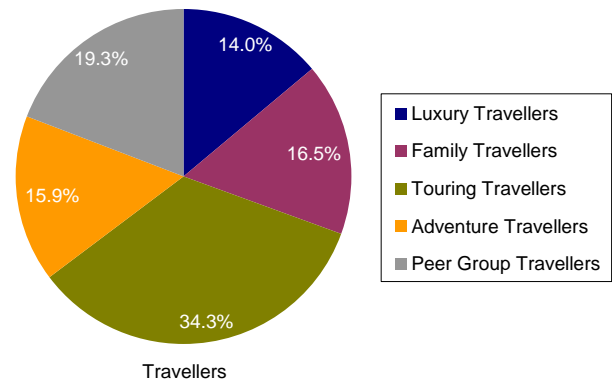
The region received nearly 3/4 (70.2%) of visitors and close to 2/3 (65.5%) of nights from intrastate (Sydney contributed more than Regional NSW for both visitors and nights).

Almost 3/10 (29.8%) of visitors and over 1/3 (34.5%) of nights came from interstate (ACT was the biggest interstate market for both visitors and nights).

#### Transport

Nearly 9/10 (88.7%) of visitors to the region travelled by 'Private or company car'. 'Air transport' (3.2%) was the 2<sup>nd</sup> most popular, followed by 'Railway' (3.0%).

#### Australian travel segments <sup>(1)</sup>



Over 1/3 (34.3%) of visitors to the region were 'Touring travellers'. 'Peer group travellers' (19.3%) was the 2<sup>nd</sup> largest travel segment, followed by 'Family travellers' (16.5%).

(1) Source: HTS, YE Jun 06, Roy Morgan Research

#### Expenditure (incl airfares and transport costs) <sup>(2)</sup>

Domestic overnight visitors spent, on average, \$108 per night in the region.

(2) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Dec 06, TRA

#### Tourism employment <sup>(3)</sup>

An estimated 4,100 (5.3%) of the region's workforce were employed in the tourism industry.

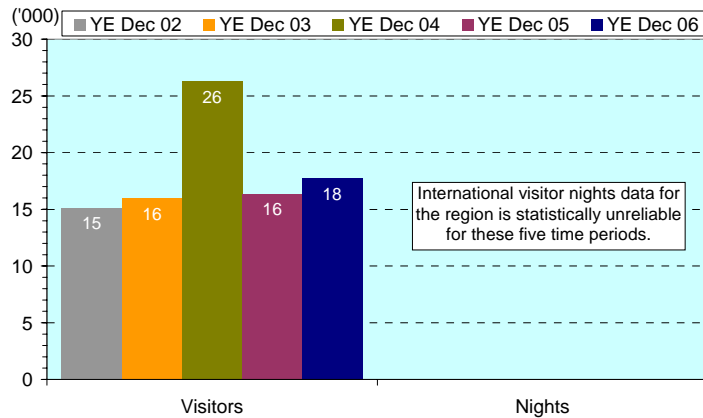
(3) Source: TTF Australia NSW Tourism Employment Atlas 2006, TTF Australia



Total visitors ('000)	2,546
Domestic nights ('000)	2,001
Total expenditure (\$m)	\$351

## International Overnight Travel

### Visitors and nights



The region received 17,800 international overnight visitors - up by 8.5% on YE Dec 05. International visitor nights data for the region is statistically unreliable for these five time periods.

Note: The number of overnight trips to Australia by international visitors increased by 1.0 percent on last year and by 14.3 percent compared to four years ago.

### Market share

The region received 3.1% of visitors to and 3.1% of nights in Regional NSW. Compared to YE Dec 05, the share of visitors was up by 0.1% point and the share of nights was down by 0.2% points.

### Purpose of visit

'Holiday/pleasure' (53.4%) was the largest purpose for visitors to the region. 'Visiting friends and relatives' (32.5%) was the 2<sup>nd</sup> largest, followed by 'Business' (6.2%).

### Origin

Market	Share	Market	Share
Hong Kong	1.1%	New Zealand	17.7%
Singapore	1.8%	Japan	2.0%
Malaysia	0.8%	USA	10.4%
Indonesia	1.1%	Canada	5.9%
Taiwan	0.0%	United Kingdom	26.0%
Thailand	0.6%	Germany	6.0%
Korea	2.2%	Scandinavia	1.6%
China	0.5%	Other Europe	16.3%
India	0.0%	Middle East & Nth Africa	0.0%
Other Asia	2.9%	Other Countries	3.1%

'United Kingdom' (26.0%) was the largest source market of visitors to the region. 'New Zealand' (17.7%) was the 2<sup>nd</sup> largest.

### Accommodation

Nearly 2/5 (37.3%) of nights in the region were spent in 'Home of friend or relative'. 'Guest house / Bed and Breakfast' (20.7%) was the 2<sup>nd</sup> most popular, followed by 'Rented house / apartment / unit / flat' (13.4%).

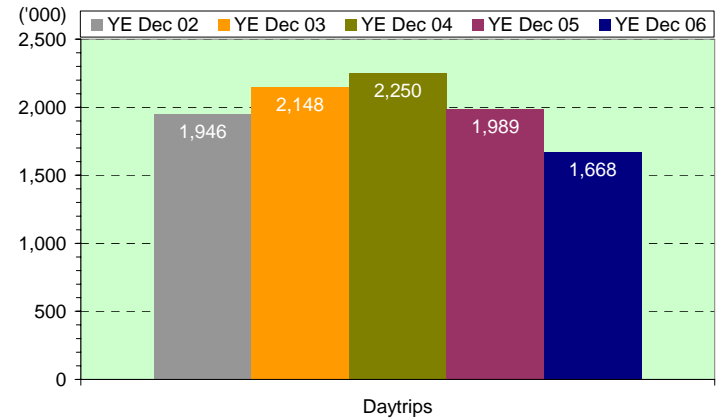
### Expenditure (incl package expenditure) <sup>(4)</sup>

International overnight visitors spent, on average, \$51 per night in the region.

(4) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Dec 06, TRA

## Domestic Daytrip Travel

### Trips



The region received nearly 1.7 million domestic daytrip visitors - down by 16.1% on YE Dec 05.

Note: Nationally, the number of domestic daytrips taken by Australians increased by 3.3 percent on last year, but was down by 5.4 percent compared to four years ago.

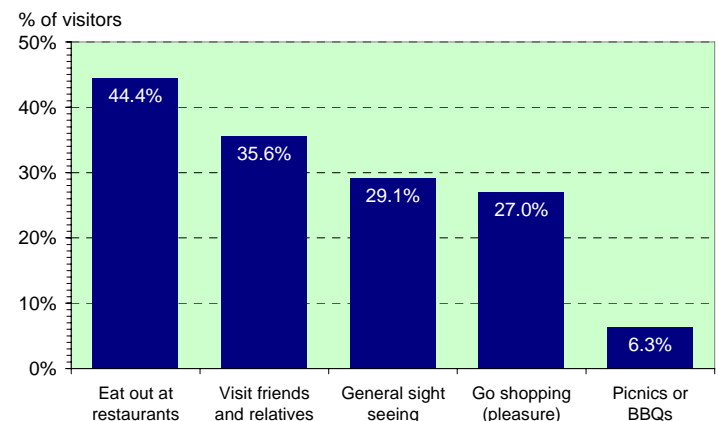
### Market share

The region received 5.8% of daytrips to Regional NSW. Compared to YE Dec 05, the share was down by 1.3% points.

### Purpose of visit

'Holiday or leisure' (52.5%) was the largest purpose for visitors to the region. 'Visiting friends and relatives' (33.9%) was the 2<sup>nd</sup> largest, followed by 'Business' (8.3%).

### Activities



Over 2/5 (44.4%) of visitors to the region 'Ate out at restaurants'. 'Visit friends and relatives' (35.6%) was the 2<sup>nd</sup> most popular activity, followed by 'General sight seeing' (29.1%) and 'Go shopping' (27.0%).

### Age

Nearly 1/4 (23.6%) of visitors to the region were aged '45-54 years'. The 2<sup>nd</sup> largest age group was 'Aged 65+' (21.4%).

### Expenditure <sup>(5)</sup>

Domestic daytrip visitors spent, on average, \$74 per trip to the region.

(5) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Dec 06, TRA