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SHOALHAVEN CITY COUNCIL

TOURISM IN THE SHOALHAVEN



**PROFILE AND STATEMENT
OF ECONOMIC IMPACT
For the year ending 31 December 2006**

30 September 2007

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, Eurobodalla Shire and Bega Valley Shire together were recognised by the NSW Government, (Tourism New South Wales), as the South Coast Region in 2006.

For the financial year 2007-2008 a new South Coast Region was formed representing the areas of Wollongong City, Shellharbour City, Kiama Municipality, Shoalhaven City, Jervis Bay Territory, Eurobodalla Shire and Bega Valley Shire. This was announced by the NSW Minister for Tourism Mr Matt Brown MP, Member for Kiama at Gerringong on the 8th June 2007 and is recognised by the NSW Government.

The following estimates have been prepared for Shoalhaven City for the 12 months ending 31 December 2006.

They include Shoalhaven City Local Government Area and Jervis Bay Territory

Year Ending December 2006	Shoalhaven (Incl. JBT)
Number of Domestic Overnight Visitors	1,260,000
Number of Domestic Visitor Nights	4,397,000
Number of Domestic Day Visitors	940,000
Expenditure-Domestic Overnight visitors	\$452,891,000
Expenditure by Day Visitors	\$88,360,000
International Visitors	
Number of Visitors	27,000
Number of Visitor Nights - unreliable data	94,000
Number of Day visitors - unreliable data	20,000
Expenditure by International Overnight Visitors	\$9,776,000
Expenditure by International Day Visitors	\$1,880,000
Totals	<u>\$552,900,000</u>
Total Expenditure by all Visitors	\$552,000,000

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 2006. If figures for 2006 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 2006

South Coast Domestic - \$103 per night

South Coast Domestic - \$94 per day

NSW Domestic - \$138 per night

NSW Domestic - \$97 per day

South Coast International \$104 per night in the region

South Coast International - \$94 per day (assumed same as domestic)

NSW International \$91 per night in the region

NSW Domestic - \$97 per day (assumed same as domestic)

Year Ending December 2006	Shoalhaven (Incl. JBT)	South Coast	NSW
Number of Domestic Overnight Visitors	1,260,000	3,301,000	24,851,000
Number of Domestic Visitor Nights	4,397,000	11,805,000	86,197,000
Number of Domestic Day Visitors	940,000	4,728,000	44,229,000
Expenditure-Domestic Overnight visitors	\$452,891,000	\$1,223,247,000	\$11,895,186,000
Expenditure by Day Visitors	\$88,360,000	\$380,566,000	\$4,290,213,000
International Visitors			
Number of Visitors	27,000	96,000	2,785,000
Number of Visitor Nights - unreliable data	94,000	1,308,000	57,254,000
Number of Day visitors - unreliable data	20,000	80,000	
Expenditure by International Overnight Visitors	\$9,776,000	\$115,037,000	\$5,210,114,000
Expenditure by International Day Visitors	\$1,880,000	\$6,640,000	
Totals	\$552,900,000	\$1,725,490,000	\$21,395,513,000
Total Expenditure by all Visitors	\$552,000,000	\$1,700,000,000	\$21,390,000,000
Dependent Jobs Estimate (2005):*	Direct	Including Indirect	
	3,750	5,812	
* preliminary estimates using Federal Dept of Tourism default \$:jobs ratios and multipliers			
Total Labour Force - Shoalhaven	33,011		
Small Area Labour Markets. Department of Employment and Workplace Relations			
Tourism percentages	11%	18%	

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*

Local Government Visitation 2006

Domestic Visitors

rank	2006	2006 Overnight Visitors '000
	Sydney	7,842
1	Shoalhaven (incl JBT)	1,260
2	Newcastle	943
3	Coffs Harbour	797
4	Hastings (PM)	770
5	Gosford (C)	730
6	Eurobodalla (A)	649
7	Wollongong (C)	601
8	Port Stephens (A)	564
9	Bega Valley (A)	537
10	Blue Mountains (C)	475
11	Byron (A)	474
12	Great Lakes (A)	466
13	Tweed	449
14	Albury (C)	434
15	Clarence Valley	424

Domestic Visitor Nights

rank	2006	2006 Visitor Nights '000
	Sydney	86,112
1	Shoalhaven (incl JBT)	4,397
2	Coffs Harbour	2,807
3	Bega Valley (A)	2,677
4	Hastings (PM)	2,677
5	Newcastle	2,295
6	Eurobodalla (A)	2,287
7	Port Stephens (A)	2,221
8	Tweed	2,221
9	Byron (A)	2,055
10	Gosford (C)	2,028
11	Great Lakes (A)	1,768
12	Clarence Valley	1,751
13	Wollongong (C)	1,689
14	Snowy River (A)	1,495
15	Tamworth Regional	1,372

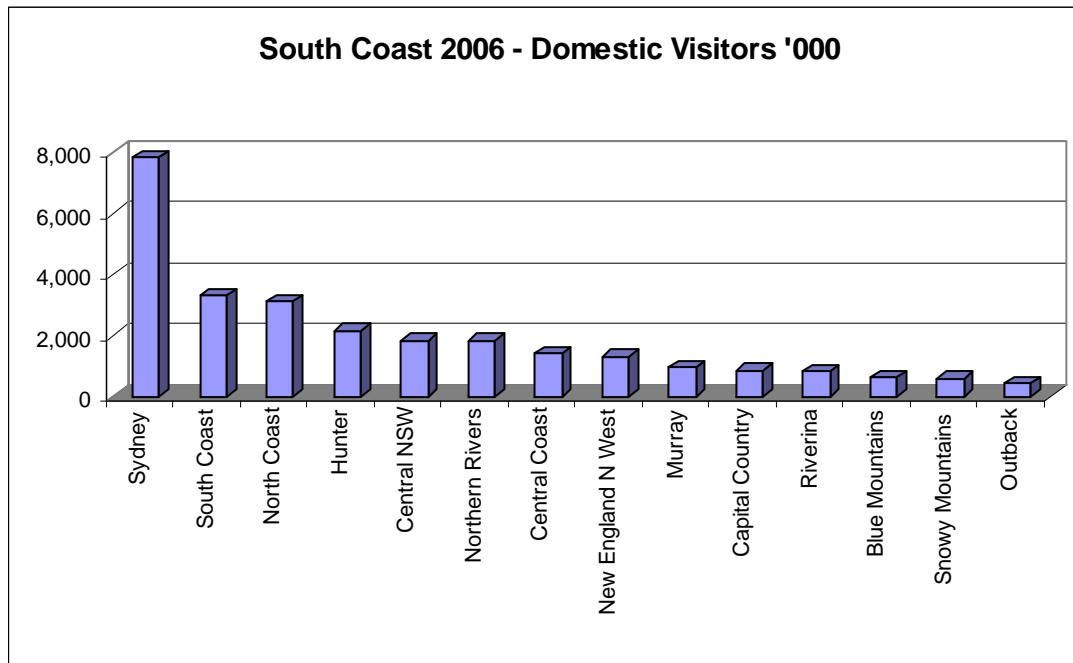
South Coast Comparisons with other Regions

	Visitors	Visitor Nights	Day Visitors	International Visitors	International Nights
NSW	24,851,000	86,197,000	44,229,000	2,785,000	57,254,000
Lord Howe Island	n/a	n/a	n/a	n/a	n/a
1 Sydney	7,842,000	23,409,000	15,537,000	2,631,000	49,586,000
2 South Coast	3,301,000	11,805,000	4,728,000	96,000	n/a
3 North Coast	3,113,000	12,044,000	3,426,000	154,000	1,006,000
4 Hunter	2,155,000	5,600,000	4,160,000	115,000	1,123,000
5 Central NSW	1,848,000	4,686,000	2,236,000	35,000	n/a
6 Northern Rivers	1,827,000	8,005,000	2,827,000	212,000	1,555,000
7 Central Coast New England North	1,415,000	4,262,000	3,112,000	32,000	n/a
8 West	1,302,000	4,146,000	1,966,000	54,000	n/a
9 Murray	955,000	2,720,000	877,000	24,000	n/a
10 Capital Country	860,000	2,001,000	1,668,000	18,000	n/a
11 Riverina	816,000	2,165,000	1,285,000	23,000	n/a
12 Blue Mountains	640,000	1,539,000	1,722,000	56,000	n/a
13 Snowy Mountains	578,000	2,202,000	376,000	17,000	n/a
14 Outback	415,000	1,528,000	308,000	16,000	n/a

Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006

Domestic Visitors - Regions in NSW

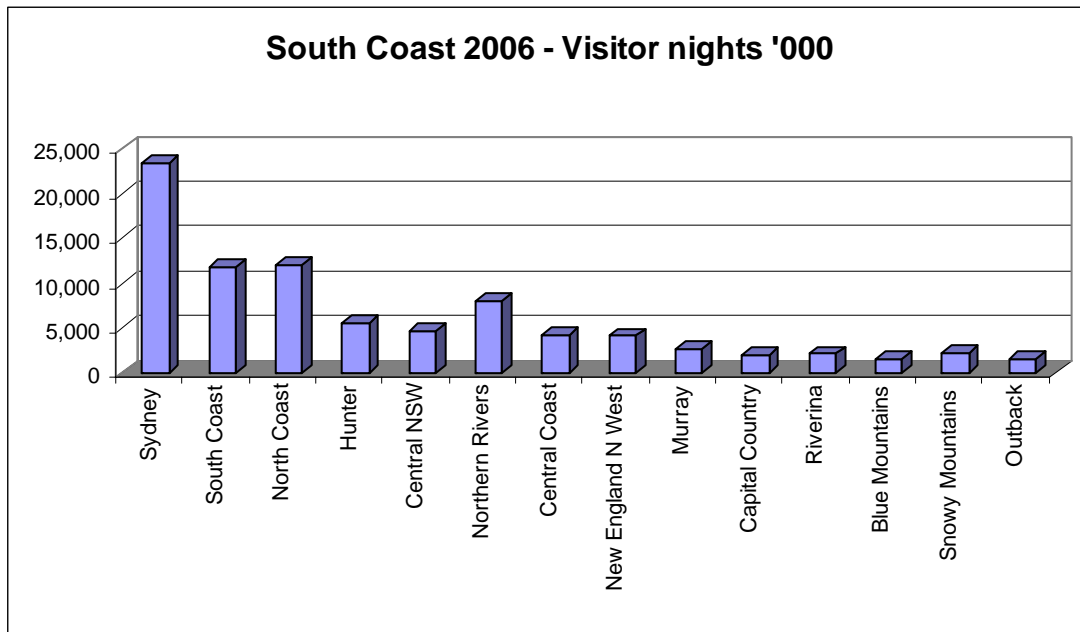
	Region	Domestic Visitors '000
1	Sydney	7,842
2	South Coast	3,301
3	North Coast	3,113
4	Hunter	2,155
5	Central NSW	1,848
6	Northern Rivers	1,827
7	Central Coast	1,415
8	New England N West	1,302
9	Murray	955
10	Capital Country	860
11	Riverina	816
12	Blue Mountains	640
13	Snowy Mountains	578
14	Outback	415



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

Domestic Visitor Nights - Regions in NSW

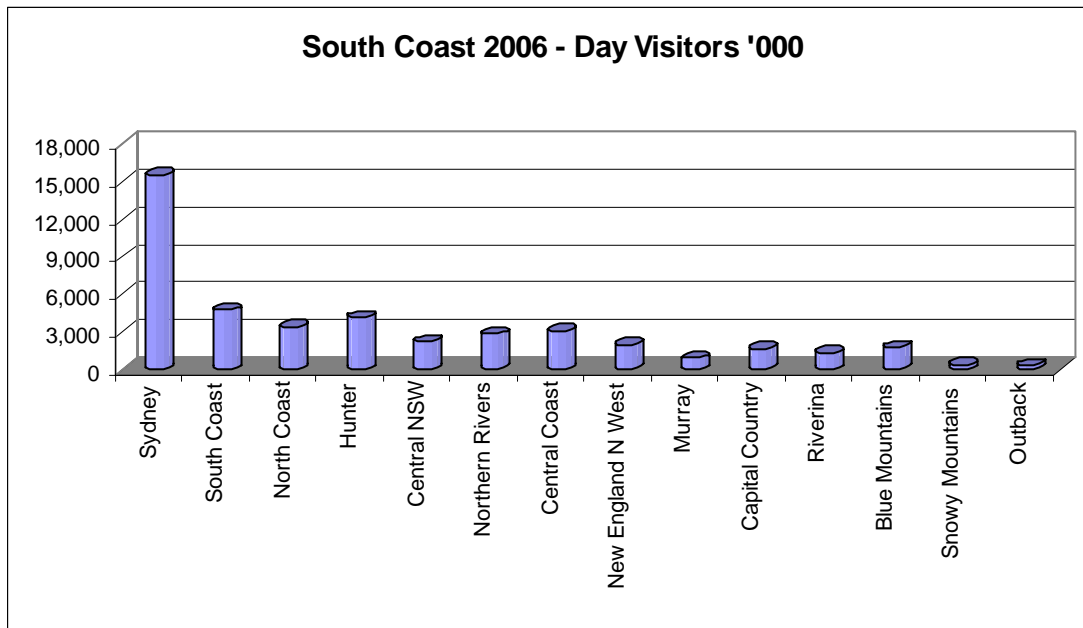
	Region	Visitor Nights '000
1	Sydney	23,409
2	South Coast	11,805
3	North Coast	12,044
4	Hunter	5,600
5	Central NSW	4,686
6	Northern Rivers	8,005
7	Central Coast	4,262
8	New England N West	4,146
9	Murray	2,720
10	Capital Country	2,001
11	Riverina	2,165
12	Blue Mountains	1,539
13	Snowy Mountains	2,202
14	Outback	1,528



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

Day Visitors - Regions in NSW

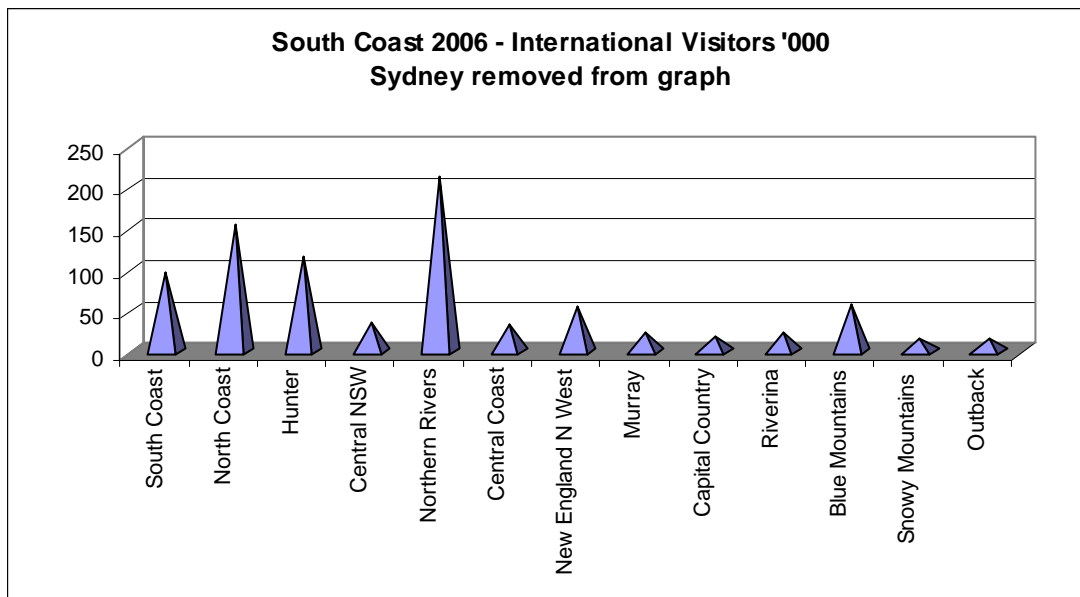
	Day Visitors '000
1 Sydney	15,537
2 South Coast	4,728
3 North Coast	3,426
4 Hunter	4,160
5 Central NSW	2,236
6 Northern Rivers	2,827
7 Central Coast	3,112
8 New England N West	1,966
9 Murray	877
10 Capital Country	1,668
11 Riverina	1,285
12 Blue Mountains	1,722
13 Snowy Mountains	376
14 Outback	308



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

International Visitors - Regions in NSW

		International Visitors '000
1	Sydney	2,631
2	South Coast	96
3	North Coast	154
4	Hunter	115
5	Central NSW	35
6	Northern Rivers	212
7	Central Coast	32
8	New England N West	54
9	Murray	24
10	Capital Country	18
11	Riverina	23
12	Blue Mountains	56
13	Snowy Mountains	17
14	Outback	16

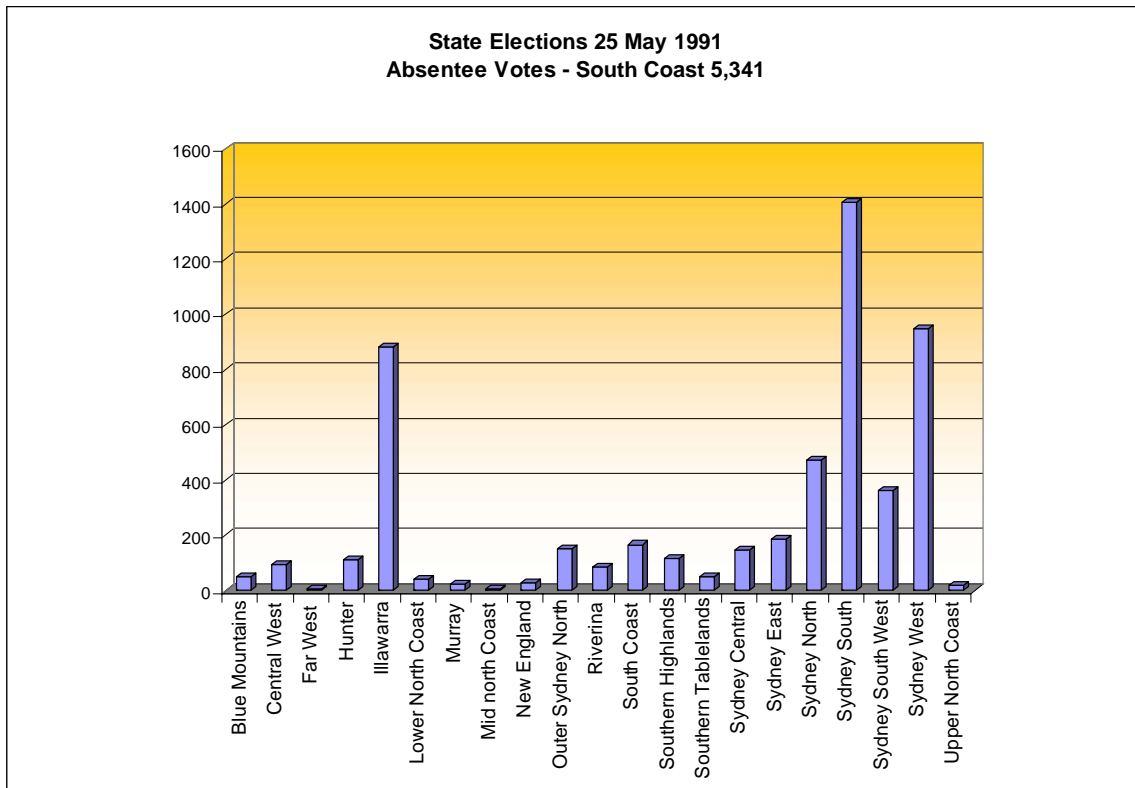


Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

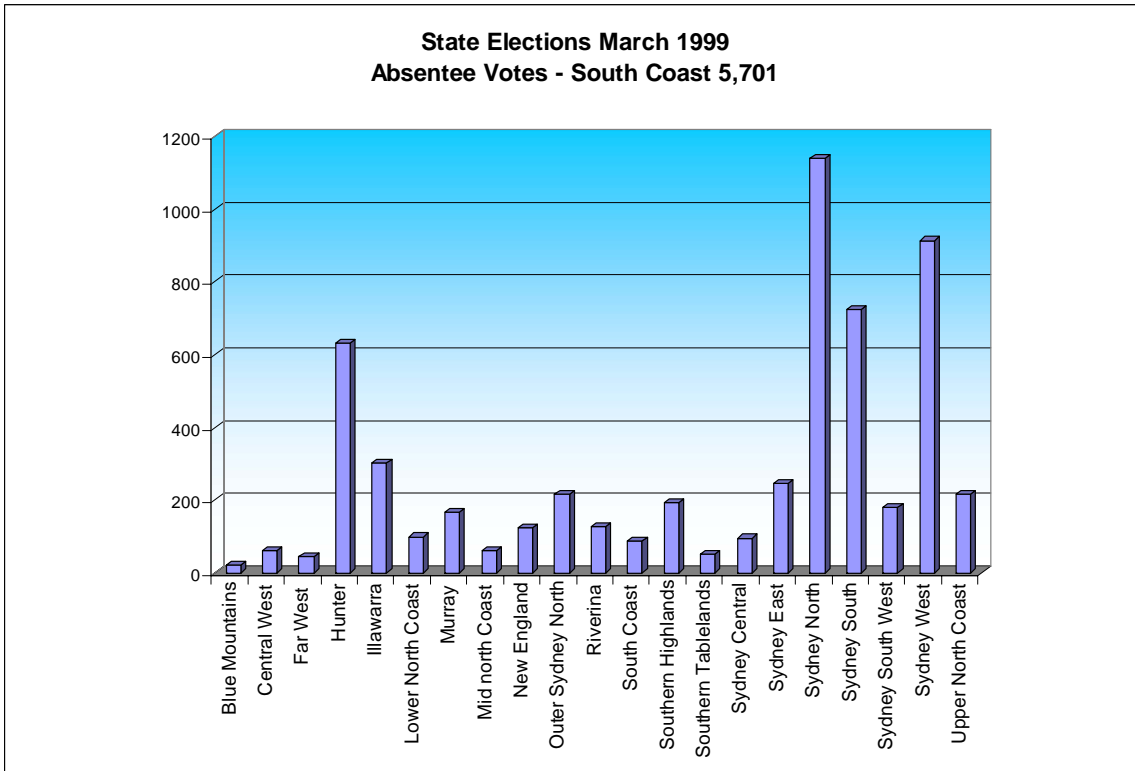
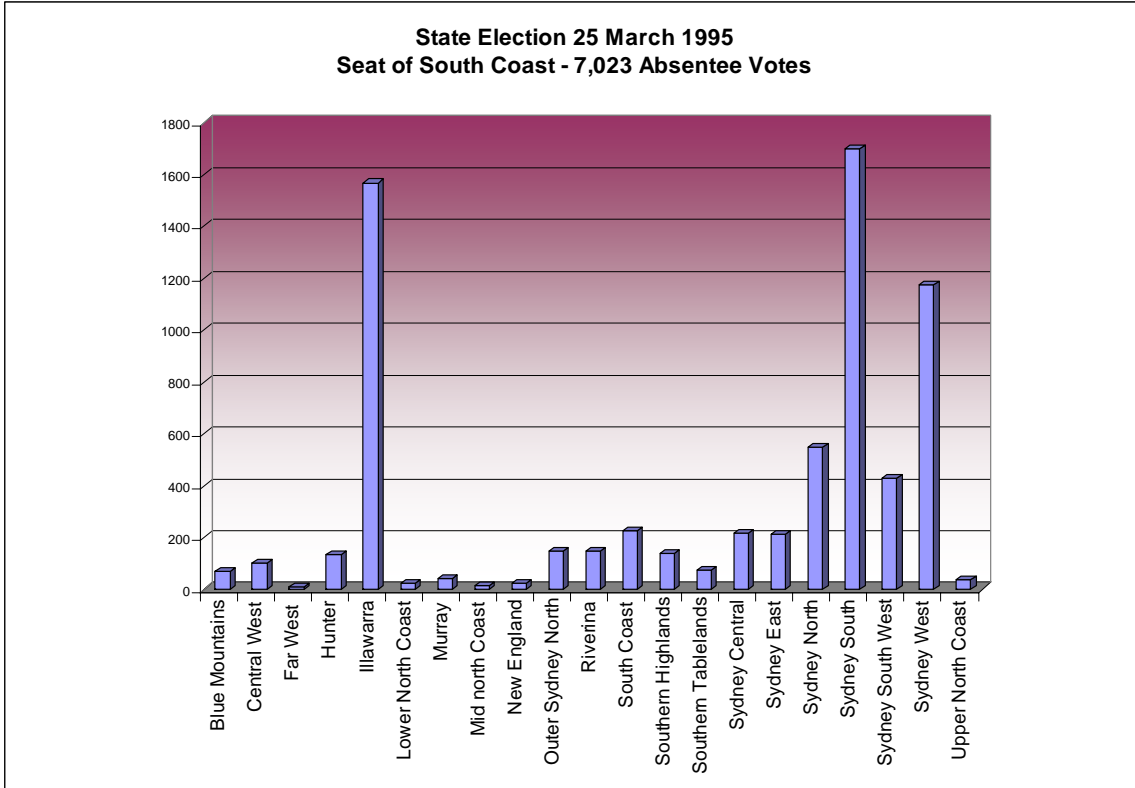
Origin of our Visitors

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.

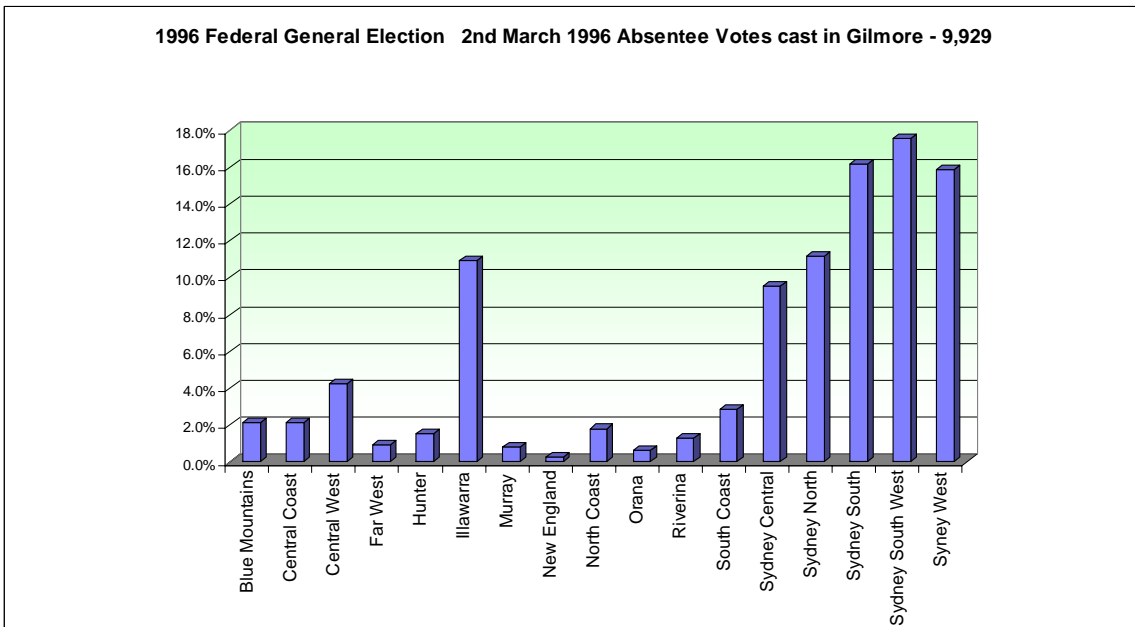
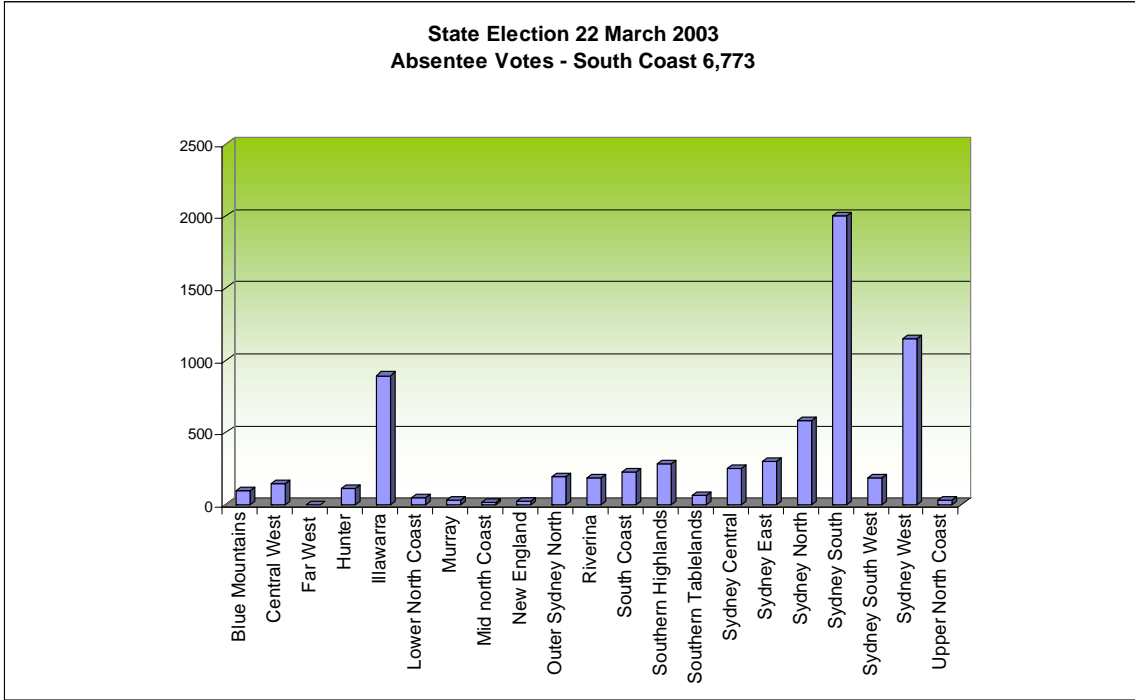
Over the years, there have been NSW and Federal General Elections. Usually on those particular weekends there were no special events in the Shoalhaven to attract visitors and the normal pattern of events is for people to stay within their own electorate. Despite this, people do visit the Shoalhaven and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



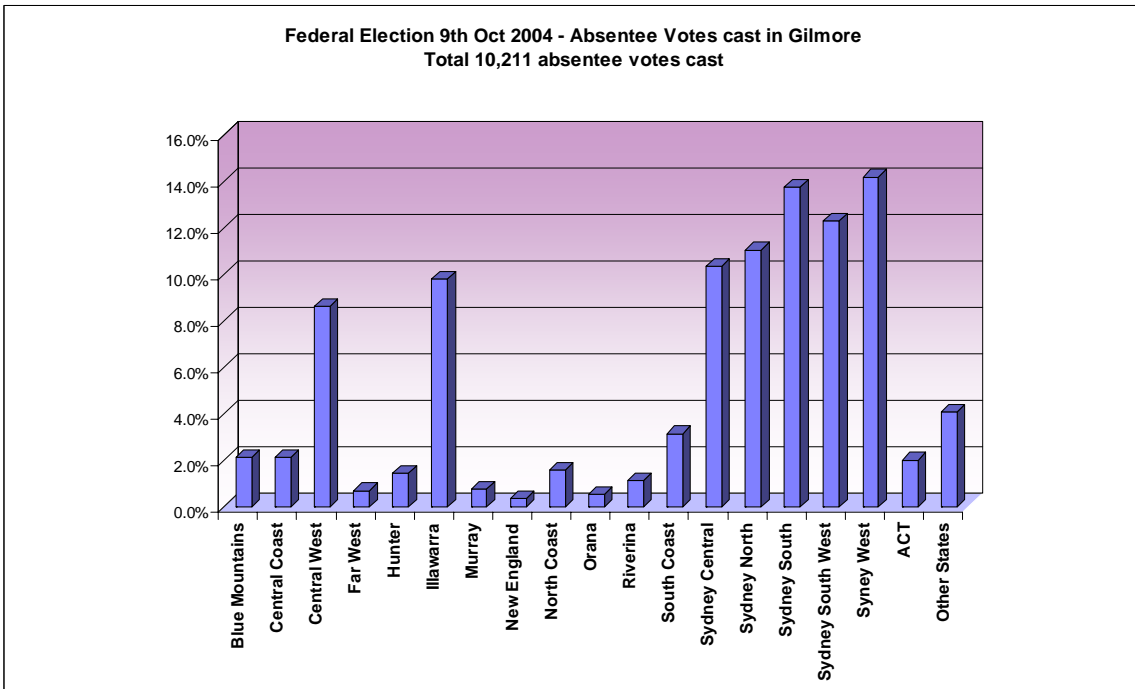
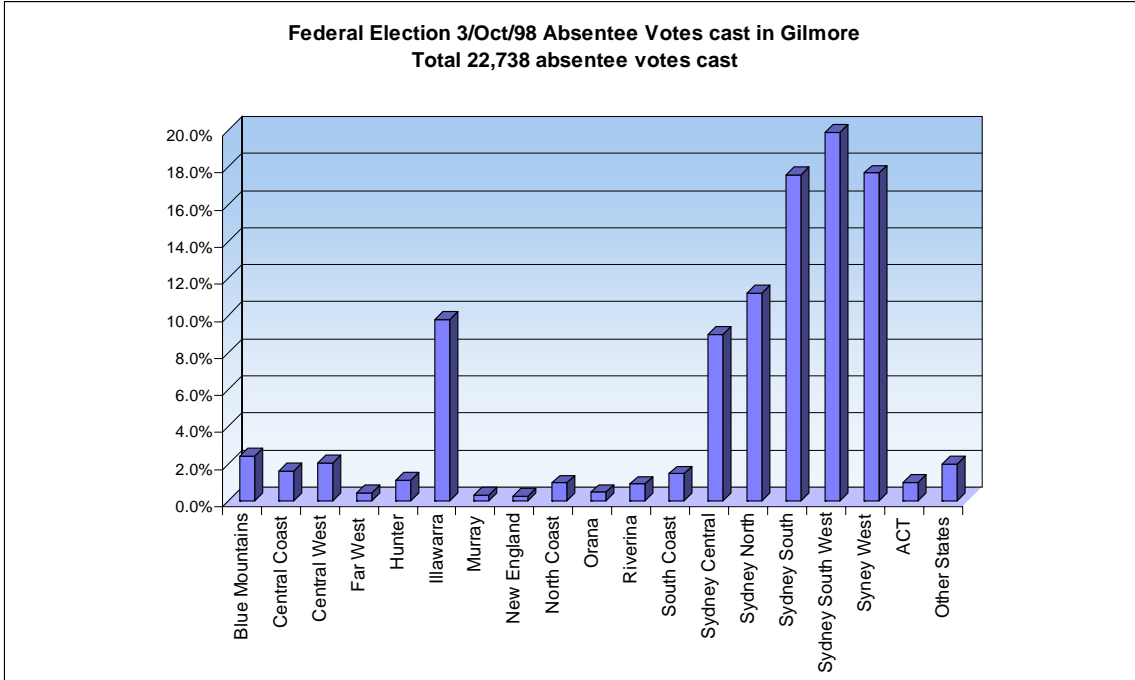
*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2006*



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for year ending 31 December 2006*



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for year ending 31 December 2006*



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.

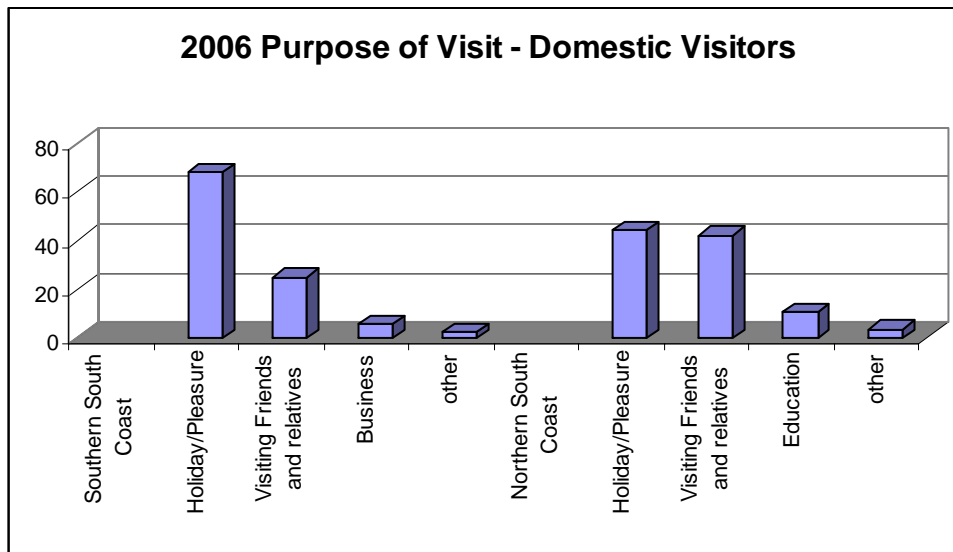
The following is extracted from the South Coast Region Tourism Profile, year ending December 2006. Prepared by Tourism New South Wales from figures supplied by Tourism Research Australia. The full document is attached.

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

Purpose of Visit - Visitors 2006

Southern South Coast	%
Holiday/Pleasure	67.7
Visiting Friends and relatives	24.8
Business	5.9
other	2.2

Northern South Coast	%
Holiday/Pleasure	44.0
Visiting Friends and relatives	42.2
Education	10.4
other	3.5

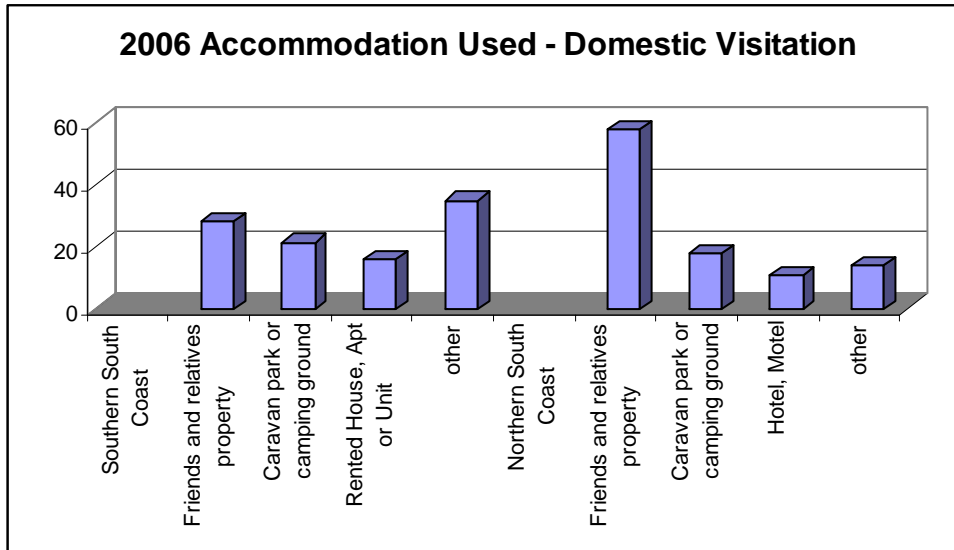


Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

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

Accommodation Used 2006

	%
Southern South Coast	
Friends and relatives property	28.0
Caravan park or camping ground	21.4
Rented House, Apt or Unit	15.8
other	34.8
Northern South Coast	
Friends and relatives property	57.4
Caravan park or camping ground	17.9
Hotel, Motel	10.6
other	14.0



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

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

During 2006 the average length of stay was 4 nights.

Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006

During the year ending June 2003, the average duration of visit to the South Coast region by domestic overnight visitors was 4.2 nights, while the median length of stay in the region was 3 nights. The average length of stay for visitors increased slightly for all purposes apart from 'other' during the year ending June 2003 compared to the previous year.

Duration of visit by purpose of visit for domestic overnight visitors to the South Coast region, year ending June 2003

	Overnight Visitors				Total
	Holidays/leisure	Visiting friends & relatives	Business	Other	
Duration of visit	02-03	02-03	02-03	02-03	02-03
	%	%	%	%	%
1 night	15	28	41	*	20
2 nights	26	29	19	*	26
3 nights	18	15	8	*	17
4 - 7 nights	27	18	32	*	25
8 - 14 nights	12	8	*	*	10
15 nights or more	2	*	*	*	2
Total '000	1,737	682	170	34	2,639
Average duration of visit	4.6	3.4	2.4	2.2	4.2
Median duration of visit (a)	3	2	2	3	3

* Subject to sampling variability too high for practical purposes.

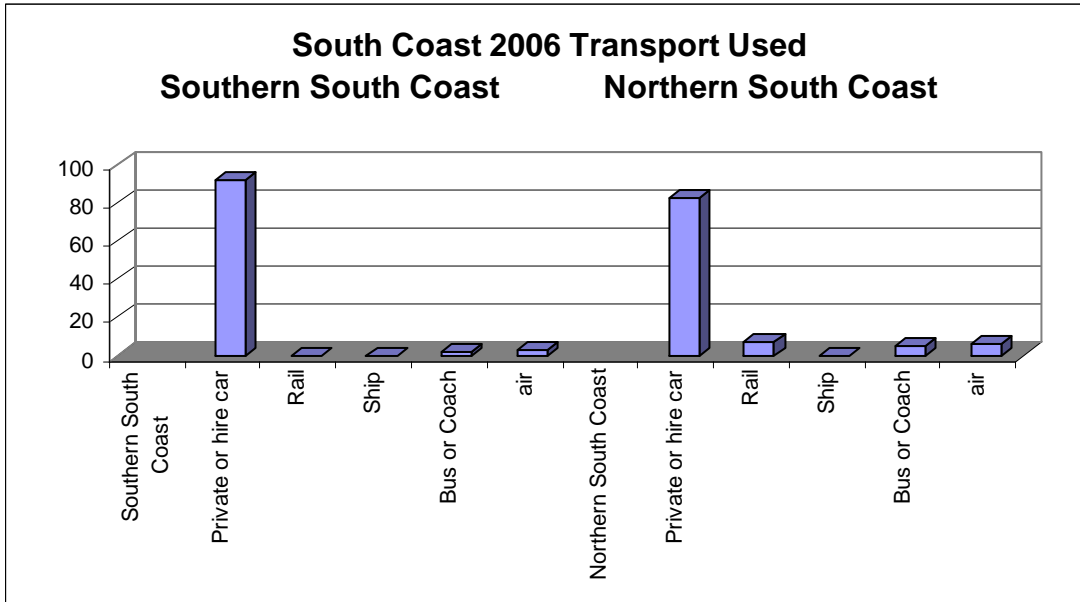
(a) The duration of stay for which 50 per cent of visitors stay longer is given by the median nights figure. The average is generally higher

than the median because of the influence of a small number of visitors who stay for long periods.

Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.

What Transport Do Our Visitors Use?

Transport Used 2006	%
Southern South Coast	
Private or hire car	92.1
Rail	0.0
Ship	0.0
Bus or Coach	1.9
air	2.7
Northern South Coast	
Private or hire car	82.1
Rail	6.6
Ship	0.0
Bus or Coach	5.0
air	6.3



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

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

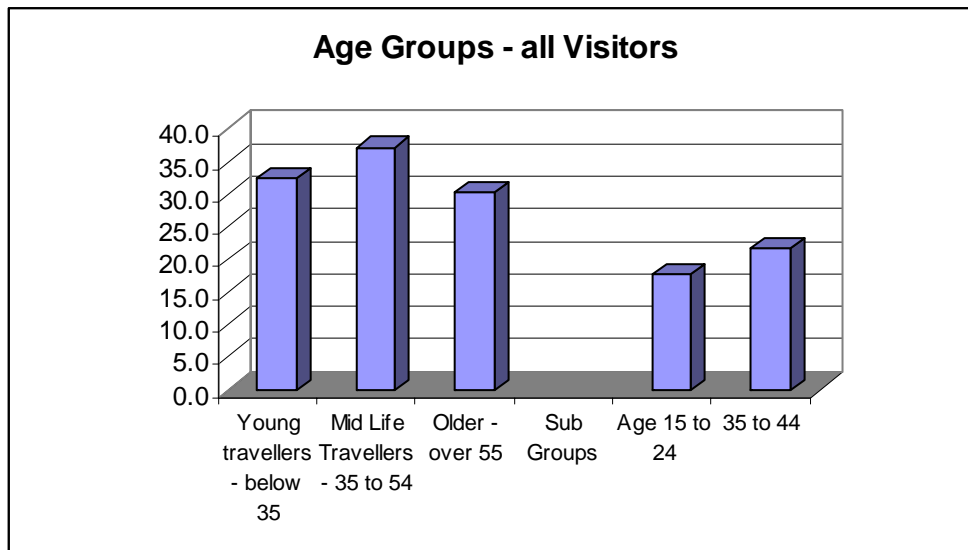
Of the 2.6 million Australians who stayed at least one night in the South Coast region during the year ending June 2003, 53 per cent were male and 47 per cent were female. The predominant age group were those aged 25-44 years, which accounted for 42 per cent of domestic overnight visitors, followed by those aged 45 to 64 years (32 per cent).

Age and sex of domestic overnight visitors to the South Coast region and New South Wales, year ending June 2002 and 2003

Age and sex	Overnight Visitors			
	South Coast Region		New South Wales	
	01-02 %	02-03 %	01-02 %	02-03 %
Males				
15 to 24 years	7	7	10	9
25 to 44 years	21	22	23	21
45 to 64 years	17	18	17	18
65+ years	5	6	5	5
Total Male	51	53	55	54
Females				
15 to 24 years	9	6	8	8
25 to 44 years	20	20	17	18
45 to 64 years	15	14	14	15
65+ years	5	7	6	6
Total Female	49	47	45	46
Total '000	2,564	2,639	26,864	27,275

Source: Tourism Research Australia, National Visitor Survey, 2002 – 2003.

Age Groups - all visitors 2005	%
Young travellers - below 35	32.5
Mid Life Travellers - 35 to 54	37.2
Older - over 55	30.3
Sub Groups	
Age 15 to 24	17.7
35 to 44	21.7



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2005.

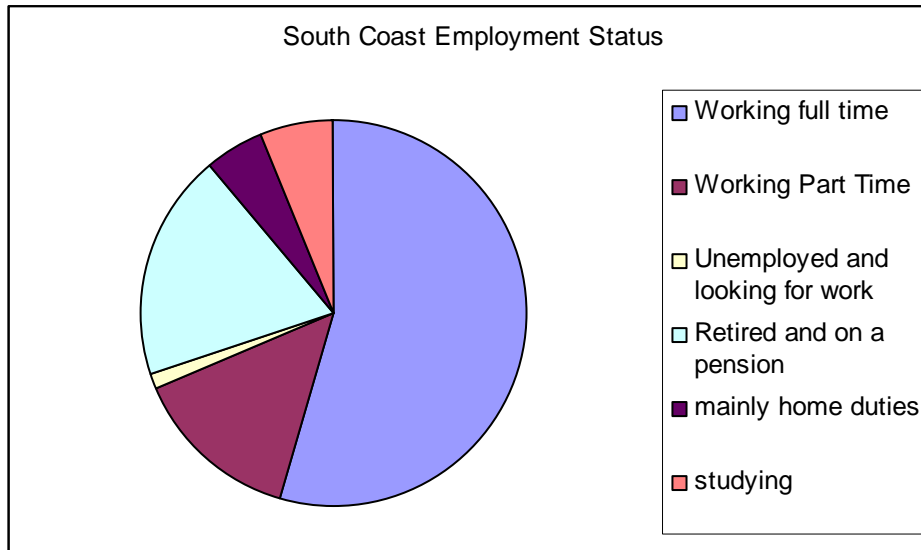
What Is The Employment Status Of Domestic Visitors To The South Coast Region?

Visitors who were employed full-time provided the largest percentage of domestic overnight visitors to the South Coast region during the year ending June 2003 (54 per cent). The next largest group were those visitors who were retired or on a pension (19 per cent), followed by those working part-time (14 per cent). There were no major changes in the employment status of visitors to the South Coast region during the year ending June 2003 compared to the previous year.

Employment status of domestic overnight visitors to the South Coast region and New South Wales, year ending June 2003

Employment status	Overnight Visitors South Coast Region	New South Wales
	02-03 %	02-03 %
Working full time	54	54
Working part time	14	14
Unemployed and looking for work	1	2
Retired or on a pension	19	16
Mainly doing home duties	5	5
Studying	6	8
Total '000	2,639	27,275

Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.



Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.

When Do Domestic Visitors Travel To The South Coast Region?

The most popular month for overnight travel to the South Coast region during the year ending June 2003 was January, which accounted for 19 per cent of visitors, followed by October and December, each accounting for 10 per cent of visitors to the South Coast region during the year ending June 2003.

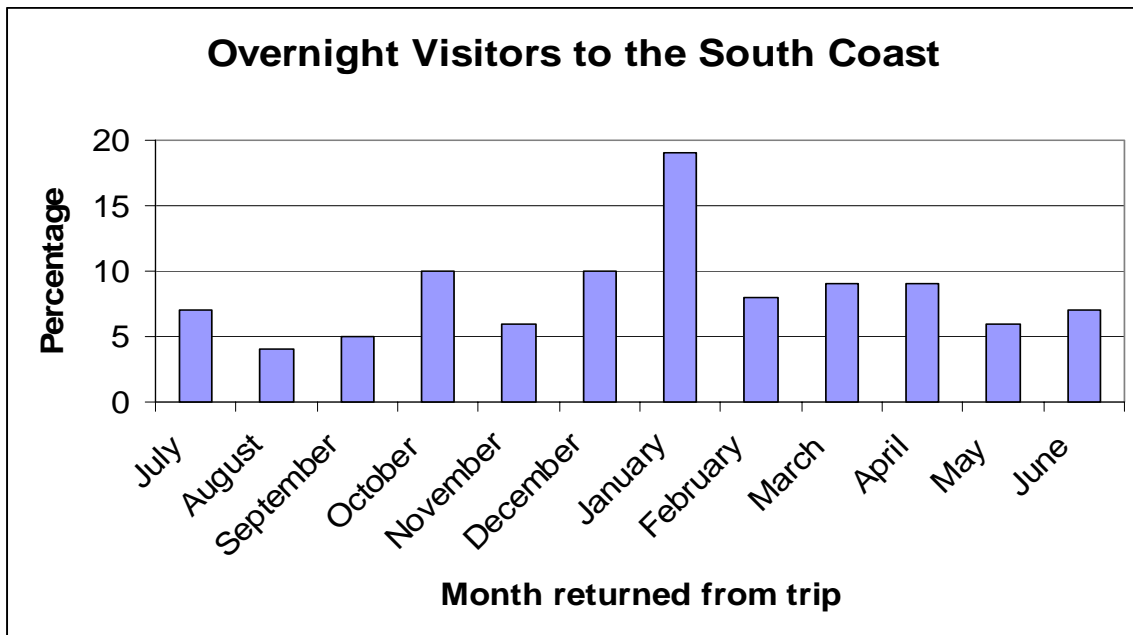
There were slight increases in the proportion of visitors who travelled to the South Coast region in December 2002 and January 2003 compared to the same months in the previous year. There was a slight decrease in the proportion of visitors who travelled in April 2003 compared to April 2002.

Domestic overnight visitors to the South Coast region and New South Wales by month returned, year ending June 2003

Month returned	Overnight Visitors	
	South Coast Region	New South Wales
	02-03	02-03
	%	%
July	7	9
August	4	8
September	5	8
October	10	10
November	6	7
December	10	9
January	19	11
February	8	7
March	9	8
April	9	9
May	6	7
June	7	8
Total '000	2,639	27,275

Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.

Month returned from Trip



What Is The Lifecycle Group Of Domestic Visitors To The South Coast Region?

The largest group of domestic visitors to the South Coast region during the year ending June 2003 were older non-working married persons (15 per cent), followed by parents with their youngest child aged 6-14 and parents with their youngest child aged 5 or less (each 14 per cent).

There was little change in share of visitors in each lifecycle group to the South Coast region, during the year ending June 2003 compared to the previous year.

Lifecycle group of domestic overnight visitors to the South Coast region and New South Wales, year ending June 2003

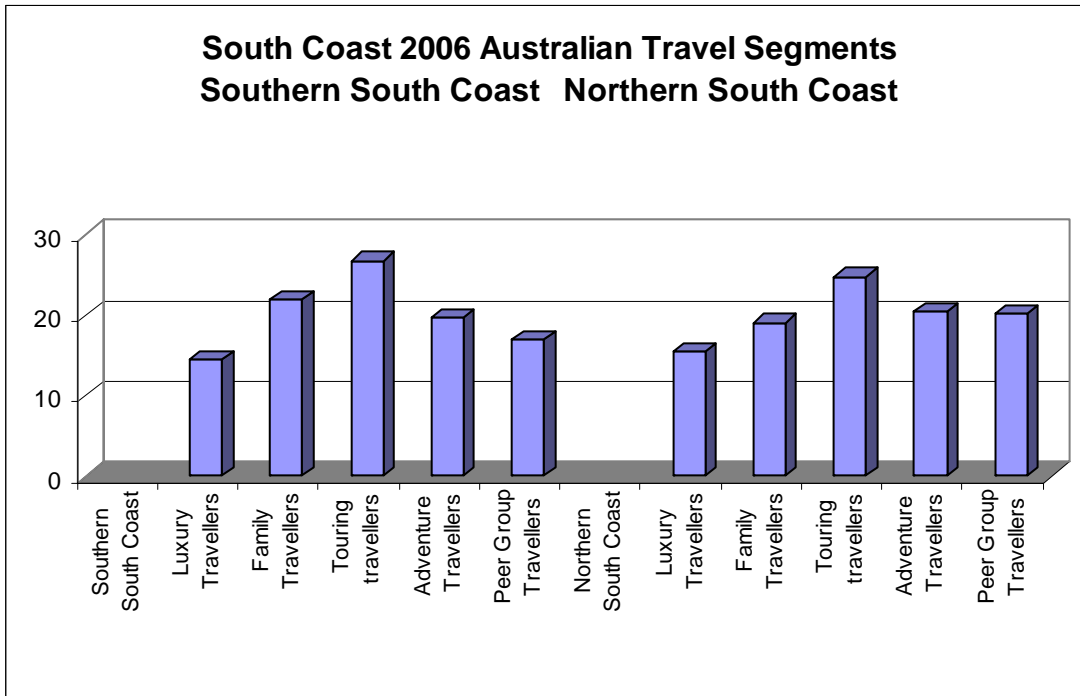
Lifecycle group	Overnight Visitors	
	South Coast Region	New South Wales
	02-03	02-03
	%	%
Young single living at home	8	10
Young single living alone or in shared accommodation	2	3
Midlife single	9	9
Young or midlife couple, no kids	13	13
Parent with youngest child aged 5 or less	14	12
Parent with youngest child aged 6-14	14	14
Parent with youngest child aged 15+ still living at home	8	8
Older working single	2	3
Older non-working single	4	4
Older working married person	11	11
Older non-working married person	15	12
Total '000	2,639	27,275

Source: [Tourism Research Australia, National Visitor Survey, 2002 - 2003.](#)

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2006*

**Australian Travel
Segments – Visitors to
the South Coast**

	2006	%
Southern South Coast		
Luxury Travellers	14.5	
Family Travellers	22.0	
Touring travellers	26.8	
Adventure Travellers	19.8	
Peer Group Travellers	16.9	
Northern South Coast		
Luxury Travellers	15.4	
Family Travellers	19.1	
Touring travellers	24.8	
Adventure Travellers	20.4	
Peer Group Travellers	20.3	



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

What Do Domestic Visitors To The South Coast Region Like To Do?

The most popular activity undertaken by domestic overnight visitors to the South Coast was go to the beach, with 49 per cent of overnight visitors participating in this activity. This was followed by eating out at restaurants (43 per cent) and general sightseeing (37 per cent).

Eighty-one per cent of visitors to the South Coast region participated in social or other activities (which included eating out at restaurants and visiting friends and relatives).

Fifty-five per cent of visitors to the South Coast region enjoyed participating in outdoor or nature activities (including going to the beach). Thirty-eight per cent of visitors participated in sports or active outdoor activities, with 21 per cent going fishing.

Domestic overnight visitor activities in the South Coast region, year ending June 2003

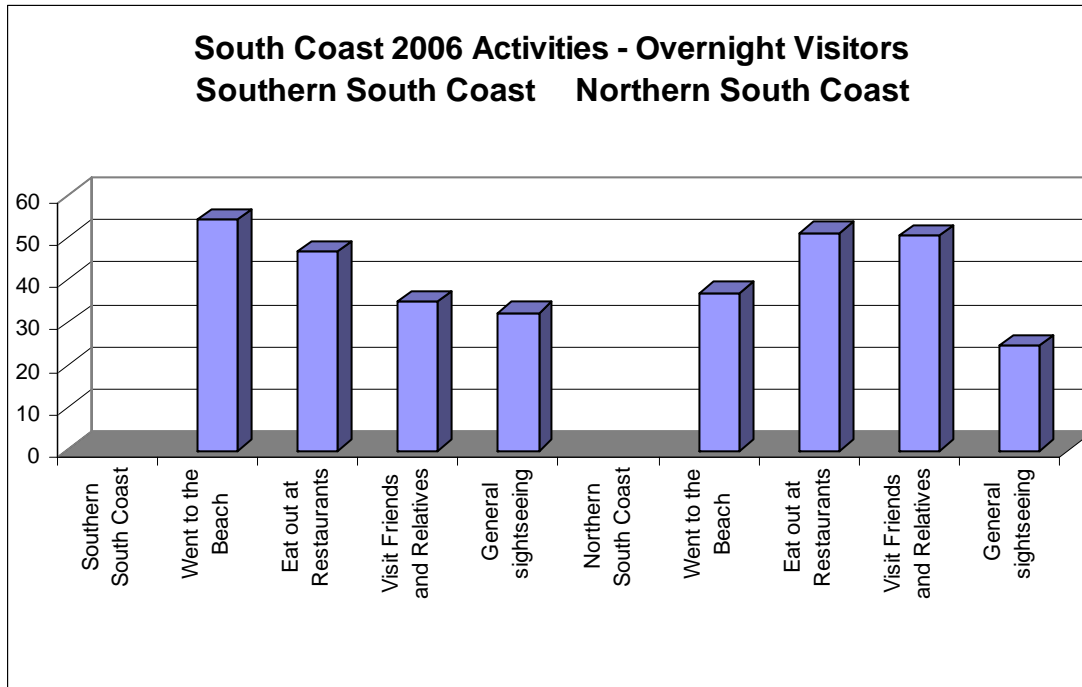
	Overnight Visitors	
	South Coast Region 02-03	New South Wales 02-03
Main leisure activities participated in	%	%
Outdoor or nature activities	55	30
Go to the beach	49	22
Visit national parks or state parks, Bush walking and Rainforest walks	19	10
Sports or active outdoor activities	38	22
Go fishing	21	7
Play golf and other sports	11	7
Other outdoor activities	10	8
Arts, Heritage or festival activities	10	10
Visit museums or art galleries	4	4
Visit art or craft workshops or studios	2	1
Visit history or heritage buildings sites	2	3
Attend festivals or fairs or cultural events	2	2
Local attractions or tourist activities	10	12
Going to markets (street or weekend or art craft)	4	4
Visit wildlife parks or zoos or aquariums	2	2
Charter boat or cruise or ferry ride	2	3
Visit amusements or theme parks	1	1
Social and others	81	82
Eating out at restaurants	43	47
General sightseeing	37	30
Visit friends and relatives	30	37
Go shopping (pleasure)	24	25
Pubs clubs discos etc	22	23
Picnics or BBQs	14	9
Total '000	2,639	27,275

Note: The percentage of visitors who participated in specific activities may sum to more than the percentage of visitors who participated in the broader activities categories as visitors may have participated in more than one activity. For example, in the outdoor nature activity group, visitors may have visited national parks as well as botanical or other public gardens. As such they are counted against both these specific activities, but only once against the broader outdoor or nature activity.

Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.

Preferred Activities of Visitors – South Coast 2006

Activities - overnight visitors 2006	%
Southern South Coast	
Went to the Beach	54.2
Eat out at Restaurants	46.7
Visit Friends and Relatives	35.1
General sightseeing	32.3
Northern South Coast	
Went to the Beach	37.0
Eat out at Restaurants	51.1
Visit Friends and Relatives	50.4
General sightseeing	24.7



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006

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

What Do Day Visitors To The South Coast Region Like To Do?

The most popular leisure activity undertaken by day visitors to the South Coast region during the year ending June 2003 was eating out at restaurants, with 51 per cent of day visitors participating in the activity. This was followed by general sight seeing (34 per cent) and shopping for pleasure (24 per cent). Eighty-five per cent of day visitors to the South Coast region participated in social or other activities (which included eating out at restaurants and visiting friends and relatives).

Domestic day visitor activities in South Coast region, year ending June 2003

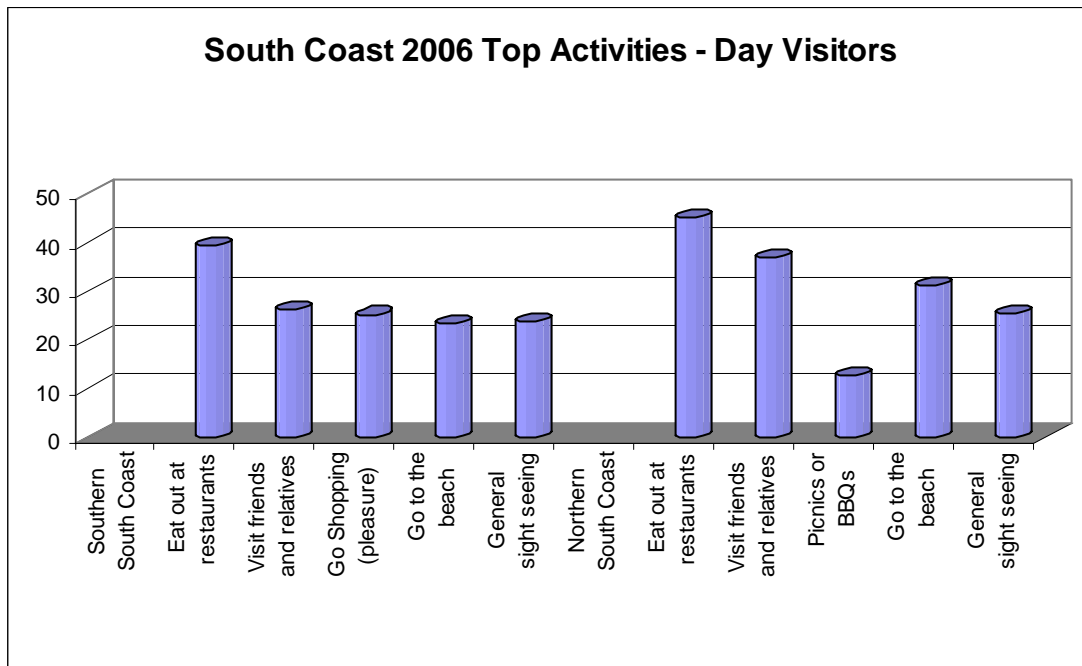
Main leisure activities participated in	South Coast Region	New South Wales
	02-03 %	02-03 %
Outdoor or Nature activities	26	17
Go to the beach	22	11
Visit national parks or state parks, Bush walking and Rainforest walks	7	5
Sports or active outdoor activities	12	10
Go fishing	5	2
Other outdoor activities	4	3
Play golf or other sports	3	3
Arts, Heritage or festival activities	8	6
Visit museums or art galleries	4	1
Local attractions or tourist activities	8	5
Going to markets (street or weekend or art craft)	3	2
Social and others	85	78
Eating out at restaurants	51	42
General sight seeing	34	21
Go shopping (pleasure)	24	21
Visit friends and relatives	23	28
Pubs clubs discos etc	10	8
Picnics or BBQs	7	8
Total '000	2,173	49,876

Note: The percentage of visitors who participated in specific activities may sum to more than the percentage of visitors who participated in the broader activity categories as visitors may have participated in more than one activity. For example, in the outdoor nature activity group, visitors may have visited national parks as well as going bushwalking or on a rainforest walk. As such they are counted against both these specific activities, but only once against the broader outdoor or nature activities.

Source: Tourism Research Australia, National Visitor Survey, 2002 - 2003.

Preferred Activities of Day Visitors - 2006

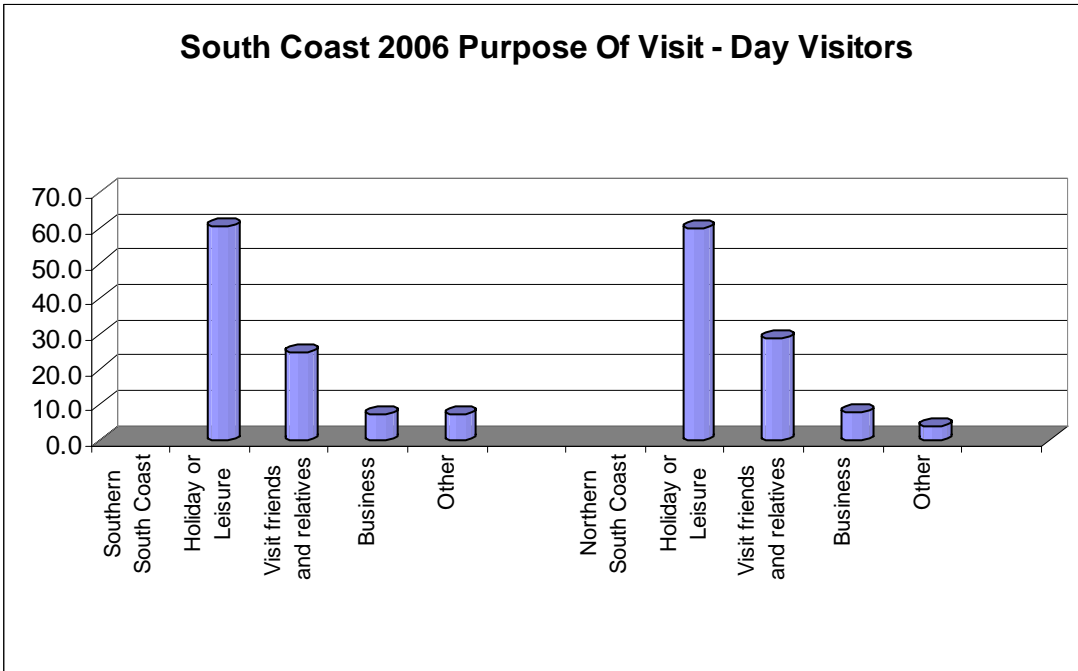
Top Activities - Day Visitors 2006		%
Southern South Coast		
Eat out at restaurants		39.3
Visit friends and relatives		26.2
Go Shopping (pleasure)		25.2
Go to the beach		23.3
General sight seeing		23.9
Northern South Coast		
Eat out at restaurants		45.0
Visit friends and relatives		36.8
Picnics or BBQs		12.6
Go to the beach		31.3
General sight seeing		25.5



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

Purpose Of Visit – Day Visitors

Purpose of Visit - Day Visitors 2006		%
Southern South Coast		
Holiday or Leisure		60.5
Visit friends and relatives		25.0
Business		7.5
Other		7.0
 Northern South Coast		
Holiday or Leisure		59.8
Visit friends and relatives		28.7
Business		7.8
Other		3.7



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

International Visitors to the South Coast Region

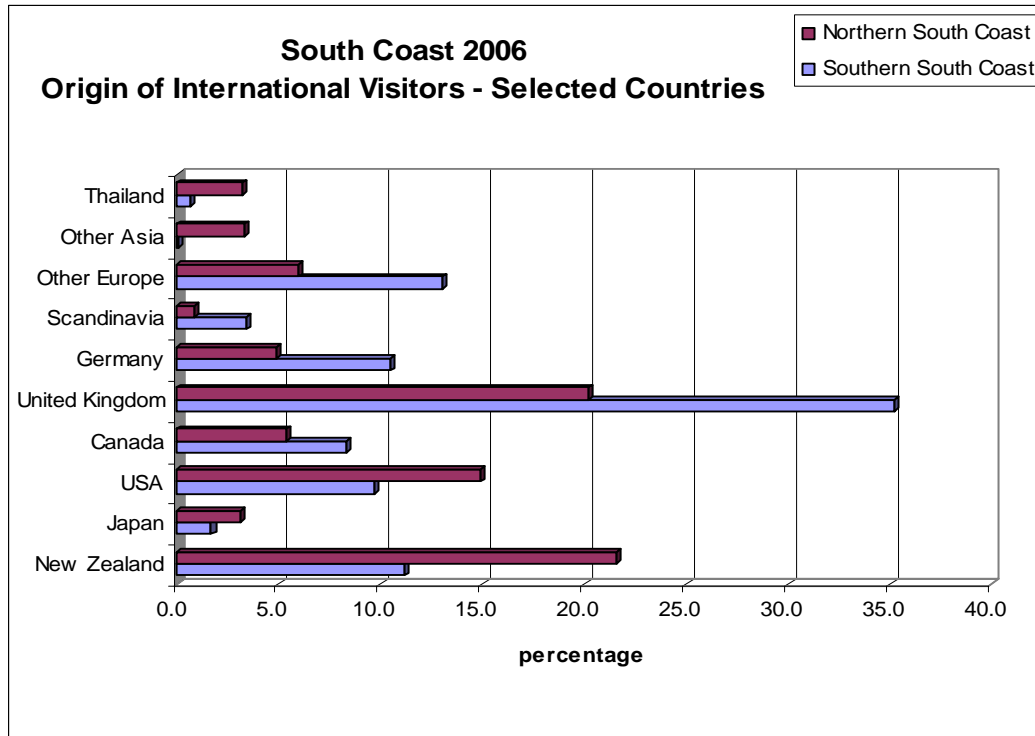
Origin of International Visitors to the South Coast Region

Origin of International Visitors 2006	Southern South Coast	Northern South Coast
New Zealand	11.2	21.6
Japan	1.7	3.1
USA	9.7	14.9
Canada	8.3	5.4
United Kingdom	35.2	20.2
Germany	10.5	4.9
Scandinavia	3.4	0.9
Other Europe	13.0	6.0
Other Asia	0.1	3.3
Thailand	0.7	3.2
Hong Kong	1.2	1.7
Singapore	1.4	1.4
Malaysia	0.3	1.5
Indonesia	0.0	1.1
Taiwan	0.1	1.2
Korea	0.4	0.9
China	0.1	4.1
India	0.0	1.0
Middle East & North Africa	0.2	0.0
Other countries	2.6	3.7

Total International Visitors

Northern South Coast – 43,000 Visitors. 1,015,000 Visitor Nights.

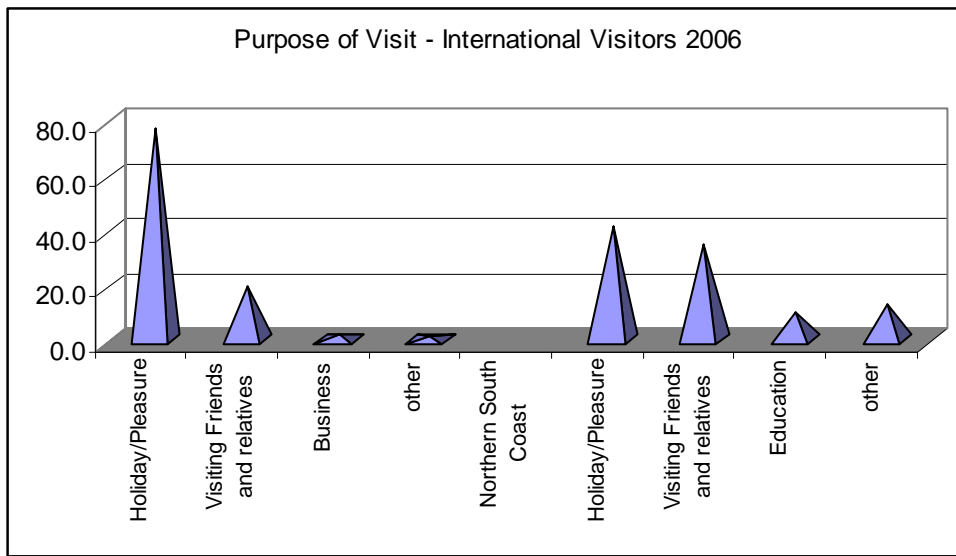
Southern South Coast – 53,000 Visitors. Unreliable data for Visitor Nights



**Purpose of Visit of International
Visitors to the South Coast**

Southern South Coast	%
Holiday/Pleasure	77.4
Visiting Friends and relatives	19.5
Business	2.1
other	1.0

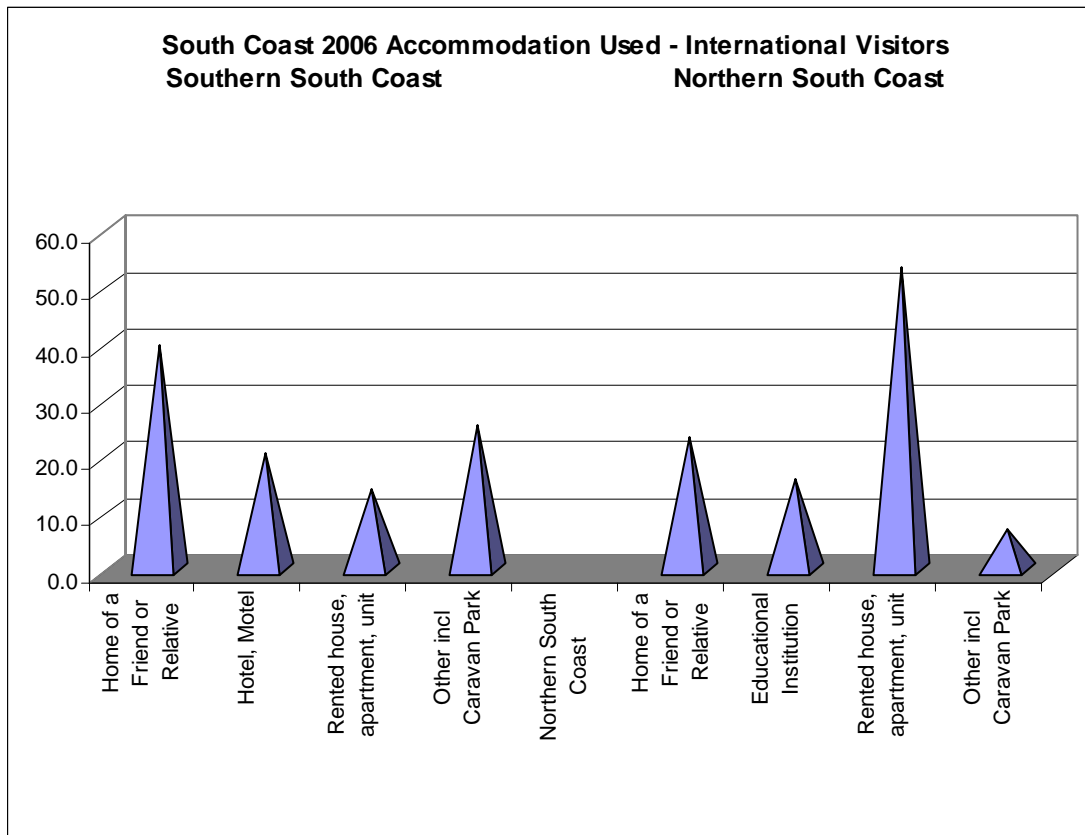
Northern South Coast	%
Holiday/Pleasure	41.7
Visiting Friends and relatives	35.1
Education	10.0
other	13.0



Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

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

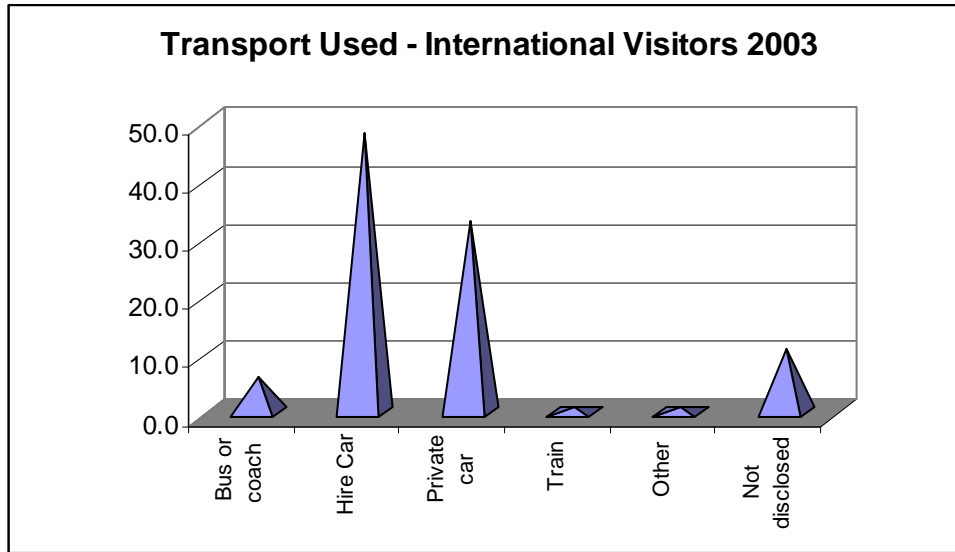


Source: Tourism Research Australia, National Visitor Survey, YE Dec 2006.

How Do International Visitors Travel To The South Coast Region?

The form of transport most used by the 62 000 international visitors to the South Coast region for the year ending June 2003 was a rental car, with 48 per cent of international visitors to the region using the mode of transport. This was followed by a private or company car (33 per cent) and a long distance bus or coach (6 per cent).

Transport used	%
Bus or coach	6
Hire Car	48
Private car	33
Train	1
Other	1
Not disclosed	11
Total '000	53



How Long Do International Visitors Stay In The South Coast Region?

During the year ending June 2003 international visitors stayed on average 4.4 nights in the South Coast region, while the median length of stay was 2 nights. Overall, and for the holiday or pleasure category there was a decrease in the average length of stay of international visitors during the year ending June 2003 compared to the previous year.

Duration of visit by purpose of visit for international visitors to the South Coast region, year ending June 2003

	Visitors		
	Holiday or pleasure 02-03	Visiting friends and relatives 02-03	Total (a) 02-03
Duration of visit	%	%	%
1 night	46	1	39
2 nights	21	4	18
3 nights	14	20	15
4 to 7 nights	13	35	17
8 nights or more	6	40	10
Total '000	52	9	62
Average duration of visit	2.6	13.0	4.4
Median duration of visit (b)	2	7	2

(a) The total includes travel for business and 'other' purposes such as educational or medical reasons.

(b) The duration of stay for which 50 per cent of visitors stay less time and 50 per cent stay longer is given by the median nights figure. The average is generally higher than the median because of the influence of a small number of visitors who stay for long periods.

Source: Tourism Research Australia, International Visitor Survey, year ending June 2002 and 2003.

Expenditure

Expenditure by Overnight Visitors - AUSTRALIA:

Expenditure items	\$million	Items of expenditure by main purpose of trip			Total	Percent
		Holiday/Leisure VFR (a)	Business (a)	Other (a)		
Package tours	1 118.1	82.8	390.5	67.3	1 658.7	4.2
Taxis	75.0	50.2	228.9	8.6 *	362.7	0.9
Airline fares	1 274.5	1 197.1	1 637.6	139.4	4 248.7	10.7
Organised tours, side trips	203.1	13.3 *	26.5 *	6.9 **	249.8	0.6
Car hire costs	327.6	176.1	208.5	16.2 *	728.5	1.8
Fuel (petrol, diesel)	1 785.2	1 200.0	915.5	158.6	4 059.3	10.2
Vehicle maintenance or repairs	82.9	96.2	86.9	14.5 *	280.5	0.7
Other long distance t'port costs	146.4	127.0	27.2 *	6.2 **	306.7	0.8
Other local transport costs	57.0	30.2 *	12.5 *	3.3 **	103.0	0.3
Accommodation	5 412.7	1 001.7	2 244.2	195.8	8 854.5	22.3
Takeaway & restaurant meals	3 185.2	1 536.3	1 226.9	159.0	6 107.4	15.4
Groceries etc for self-catering	1 403.0	648.5	245.9	62.3	2 359.7	5.9
Alcohol and drinks (not elsewhere included)	1 181.1	686.8	340.1	39.5 *	2 247.5	5.7
Shopping, gifts, souvenirs	2 420.6	1 827.2	540.8	194.2	4 982.9	12.6
Entertainment, museums, movies, zoos etc	1 060.7	284.8	93.3	23.7 *	1 462.5	3.7
Horse racing, gambling, casinos	171.2	68.8	33.8 *	2.3 **	276.1	0.7
Conference fees	3.3 **	0.1 **	269.2	6.8 **	279.4	0.7
Education, course fees	9.8 *	2.1 **	24.4 *	11.0 *	47.3 *	0.1
Other expenditure on trip (b)	481.6	285.9	180.7	114.8	1 063.1	2.7
Total (c)	20 659.4	9 331.5	8 733.5	1 230.7	39955.0	100

*** Subject to sampling variability too high for practical purposes; see section on Reliability of data on page 24 for further information.

(a) See Glossary on page 28 for information about what is included in each purpose of trip category.

(b) Other expenditure on trip includes miscellaneous trip expenditure such as postage, film processing, medical expenses and dry cleaning.

(c) Total includes visits where detailed expenditure items were not asked but excludes expenditure on capital items and on the purchase of motor vehicles.

Note: All figures relate to Australian residents aged 15 years and over.

How to read this table:

This table shows that, during the year ended 31 December 2004, overnight holiday/leisure visitors spent a total of \$1 274.5 million on airline fares.

The total expenditure for all overnight visitors for the same period was \$40.0 billion.

Tourism Research Australia National Visitors Survey Travel by Australians: December Quarter 2004

*Tourism in the Shoalhaven - Profile and Statement of Economic Impact
for year ending 31 December 2006*

Expenditure by Day Visitors - AUSTRALIA:

Expenditure items	\$million	Items of expenditure by main purpose of visit				Total	Percent
		Holiday/Leisure VFR (a)	Business (a)	Other (a)	Total		
Package tours	26.5	2.6 **	1.1 **	0.0 **	30.1	0.3	
Taxis	6.6 *	3.6 *	23.1	5.2 *	38.5	0.3	
Airline fares	28.2	11.8 *	145.2	133.7	318.9	2.9	
Organised tours, side trips	37.1	0.6 **	0.5 **	1.5 **	39.8	0.4	
Car hire costs	12.8 *	2.7 **	19.4 *	3.2 **	38.1	0.3	
Fuel (petrol, diesel)	1 189.1	714.1	283.2	269.1	2 455.5	22.0	
Vehicle maintenance or repairs	20.8 *	33.1	23.6	26.5	104.0	0.9	
Other long distance t'port costs	28.4	6.3 *	4.4 *	6.5 *	45.6	0.4	
Other local transport costs	30.0	7.5 *	5.1 *	3.5 *	46.1	0.4	
Takeaway & restaurant meals	1 225.7	449.9	158.0	163.5	1 997.1	17.9	
Groceries etc for self-catering	315.3	131.6	22.5	90.3	559.7	5.0	
Alcohol and drinks (not elsewhere included)	264.4	170.8	20.8 *	14.5 *	470.5	4.2	
Shopping, gifts, souvenirs	2 600.1	551.0	170.0	320.3	3 641.4	32.7	
Entertainment, museums, movies, zoos, etc	353.6	34.4	12.5 *	22.6	423.0	3.8	
Horse racing, gambling, casinos	60.4	10.8 *	1.5 **	1.7 **	74.4	0.7	
Conference fees	0.2 **	0.0 **	31.4	0.6 **	32.2	0.3	
Education, course fees	0.4 **	0.4 **	8.9 *	26.3	36.0	0.3	
Other expenditure on trip (b)	197.9	50.9	161.0	381.2	790.9	7.1	
Total (c)	6 397.4	2 182.1	1 092.3	1 470.1	11 141.8		

* ** Subject to sampling variability too high for practical purposes; see section on Reliability of data on page 24 for further information.

(a) See Glossary on page 28 for information about what is included in each purpose of visit category.

(b) Other expenditure on trip includes miscellaneous trip expenditure such as postage, film processing, medical expenses and dry cleaning.

(c) Expenditure on capital items and on the purchase of motor vehicles is not included in total expenditure.

Note: All figures relate to Australian residents aged 15 years and over.

How to read this table:

This table shows that, during the year ended 31 December 2004, day visitors spent \$38.1 million on car hire.

The overall total spent by day visitors during the same period was \$11.1 billion.

Tourism Research Australia National Visitors Survey Travel by Australians: December Quarter 2004