

SOUTHERN HIGHLANDS TOURISM SNAPSHOT

Tourism benefits the local visitor economy in a number of ways. What our visitors spend supports thousands of jobs that would otherwise not exist. Tourism also plays a fundamental role in shaping the image of the Highlands. This image not only influences whether or not the Highlands is chosen as a place to visit, it also influences whether the Highlands is chosen as a place to do business, live or invest.

TOURISM IN THE YEAR ENDING SEPTEMBER 2018

1.9 
MILLION VISITORS

1.2 
MILLION VISITOR NIGHTS

\$305 
MILLION VISITOR EXPENDITURE*

*Not including international day visitor spend

This visitor expenditure supported around **2,600 JOBS!**

DOMESTIC VISITOR SPEND

DOMESTIC OVERNIGHT VISITORS

\$168 **MILLION**
TOTAL EXPENDITURE

\$326 PER VISIT **\$151** PER NIGHT

\$86 **MILLION**  Restaurant & Takeaway Meals

\$13 **MILLION**  Groceries for Self Contained Accommodation

DOMESTIC DAY VISITORS

\$127 **MILLION**
TOTAL EXPENDITURE

\$96 PER VISIT

\$53 **MILLION**  Shopping (other than food & drinks)

\$16 **MILLION**  Alcohol & drinks (not included above)

International overnight visitors spent approximately \$10.3 million in the year ending September 2018 - an average of \$778 per visit.

SOURCES & NOTES: Visitor, visitor nights and visitor profile estimates have been drawn from Tourism Research Australia's (TRA) National Visitor Survey (NVS) and International Visitor Survey (IVS) for the year ending September 2018. These are sample surveys and, therefore, subject to sample survey error. Expenditure estimates are created using NVS and IVS data for Wingecarribee LGA and additional modelling that reflects the outputs of TRA's Regional Expenditure Allocation Model (REX). They are not directly comparable to previous expenditure estimates. Jobs are estimated using a combination of these expenditure estimates and the employment ratios implicit in the Capital Country Tourism Satellite Account 2013/14 (TRA & Destination NSW). Jobs estimates are full time equivalent (FTE) but do not account for the residential location of employees. They are presented in the interests of providing an approximation to encourage more detailed analysis. Any communication of data in this snapshot must acknowledge the sources and associated cautions. (Cont p2)

SOUTHERN HIGHLANDS TOURISM SNAPSHOT

OUR VISITORS IN THE YEAR ENDING SEPTEMBER 2018

DOMESTIC OVERNIGHT VISITORS

514,000 VISITORS **1.1 MILLION NIGHTS**

INTERNATIONAL OVERNIGHT VISITORS

13,200 VISITORS **152,000 NIGHTS**

DOMESTIC DAY VISITORS

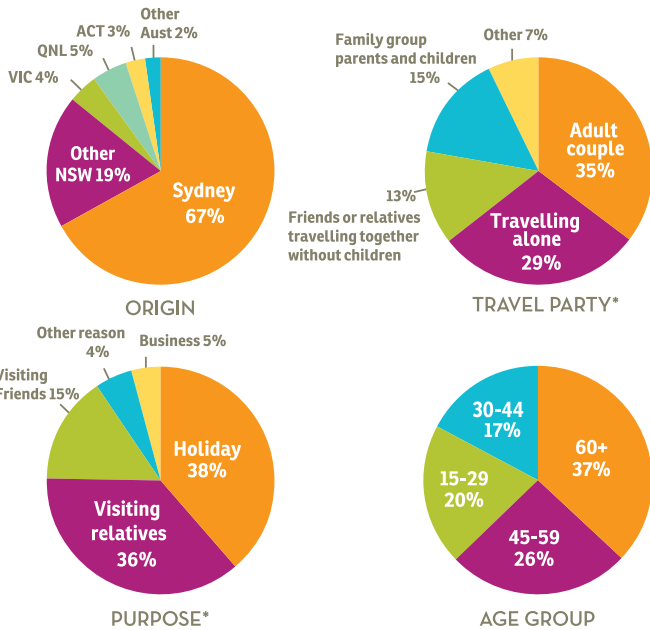
1.3 MILLION

INTERNATIONAL DAY VISITOR ESTIMATE*

APPROX 30,000 VISITORS

Domestic visitors accounted for 97% of total visitors. For a number of domestic markets, the Southern Highlands is suitable for both day and overnight visits. For these markets the same people can visit on both types of trip over the course of a year. It is important to remember, therefore, that day visitors can also be overnight visitors.

DOMESTIC OVERNIGHT VISITOR PROFILE



LENGTH OF STAY: Average 2 nights with 22% staying 3 nights or more

HOUSEHOLD INCOME: 63% earn \$100K p.a. or more

EMPLOYMENT STATUS: 43% Working full time; 20% working part time; 26% retired or on pension

TOP ACTIVITIES:

- 62% Eat out/dine at a restaurant/cafe
- 55% Visit friends & relatives
- 34% Sightseeing /looking around
- 24% Shopping for pleasure
- 17% Bush walking / rainforest walks
- 16% Pubs, clubs etc
- 15% Visit national parks / state parks

GENDER: 47% Female 53% Male

TRIP DESTINATIONS: For 85% Wingecarribee LGA the only overnight destination of visitors

DOMESTIC DAY VISITOR PROFILE

MAIN ORIGIN: Sydney (65%); Other NSW (27%)

AGE: 55+ (47%), 40-54 (26%), <40 (23%)

TOP ACTIVITIES: 1. Eating out (63%), 2. Visit friends/ Relatives (33%), 3. Sightseeing (28%), 4. Shopping for pleasure (23%)

INTERNATIONAL VISITOR PROFILE**

MAIN ORIGINS: UK (21%), NZ (19%), USA (16%), Europe exc. UK(20%), All Asia (19%)

AGE: 55+ (38%), 40-54 (31%), <35 (37%) **Independent (FIT):** 63%

TOP ACTIVITIES (Whilst in Aust.): 1. Eating out (90%), 2. Shopping for pleasure (73%), 3. Sightseeing (71%), 4. Beach (61%), 5. National Parks (51%)

GENDER: Male 53% Female 47%

SOURCES & NOTES: Visitor, visitor nights and visitor profile estimates have been drawn from Tourism Research Australia's (TRA) National Visitor Survey (NVS) and International Visitor Survey (IVS) for the year ending September 2018 with the exception of international visitor profile which uses a four year annual average. These are sample surveys and, therefore, subject to sample survey error. Expenditure category estimates represent the combined spend of domestic overnight visitors and domestic day visitors. Domestic overnight visitor category expenditure assumes the spend profile of visitors that spend all trip nights in the Wingecarribee Local Government Area (85% of total) is the same as all domestic overnight visitors. Both domestic overnight and domestic day visitor spend has been discounted to estimate the trip spend that may have occurred outside of the Wingecarribee Local Government Area.

*International day visitor estimate is based on international visitors that visited Bowral less those who stayed overnight in the Wingecarribee Local Government Area.

**For the four years ending Sept '18 given small sample size. *Pie Charts May not add to 100% due to rounding.