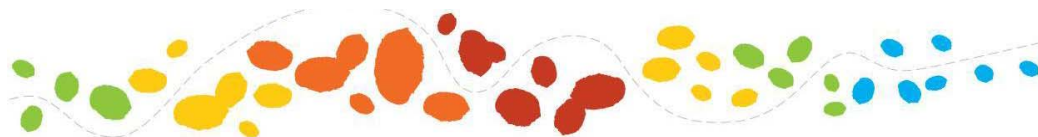


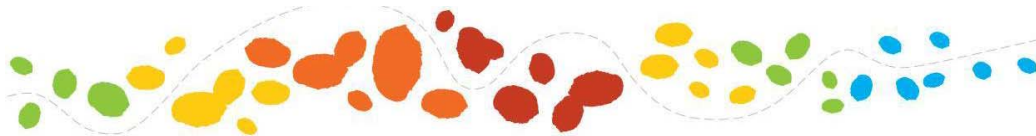
Tourism NSW Insights Presentation Sapphire Coast Monday 20 June 2011

Ruth Morris
Department of Trade and Investment



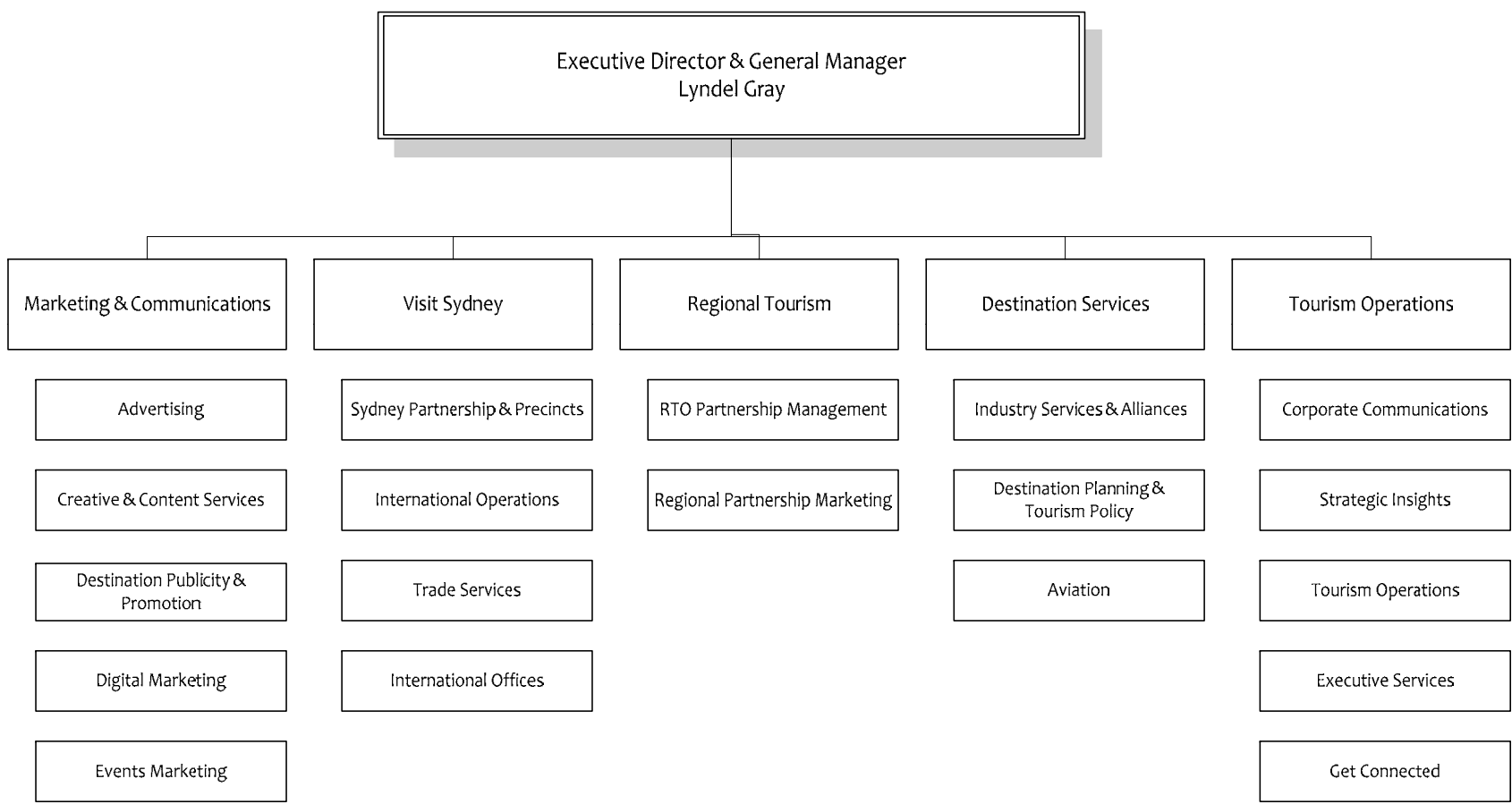
Today's Presentation

- **The Future of Tourism in NSW**
- **Sapphire Coast Visitor Profile**
- **Domestic Overnight Visitor Trends – NSW**
- **General Tourism Trends**
- **Consumer Expenditure Changes**



Tourism New South Wales

Tourism New South Wales Organisation Chart

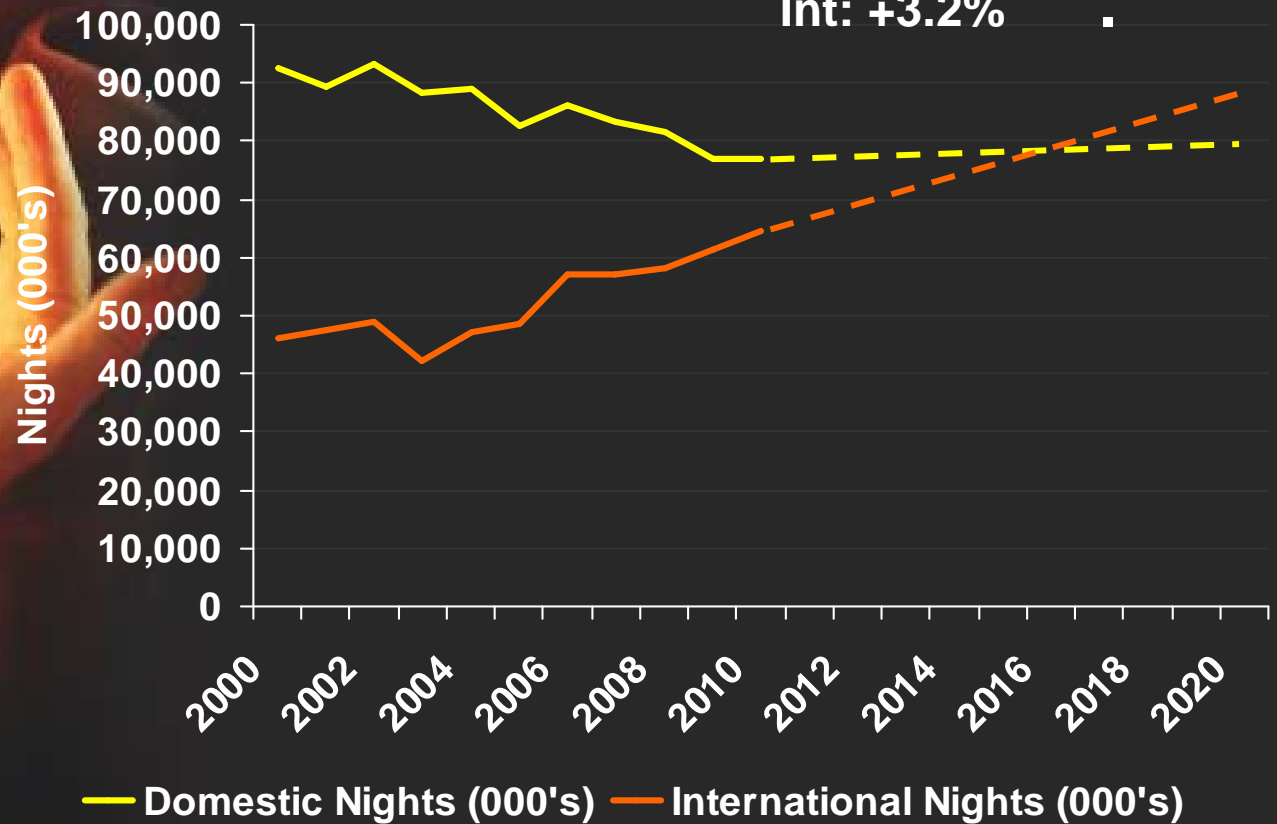


Visitors Nights in NSW Forecast

Avg % Growth per year
2009-2020

Dom: + 0.3%

Int: +3.2%



Source: Tourism Forecast Committee Issue 2, 2010

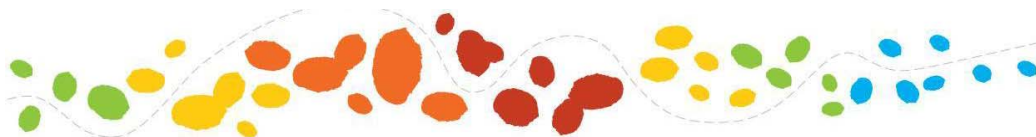
Tourism Surveys:

Domestic Data

- **Tourism Research Australia's National Visitor Survey**
 - Annual sample 120,000.
 - Random digit dialling and Computer Assisted Telephone Interviewing system.
 - Details about recent travel, for day trips, overnight stays and overseas travel.

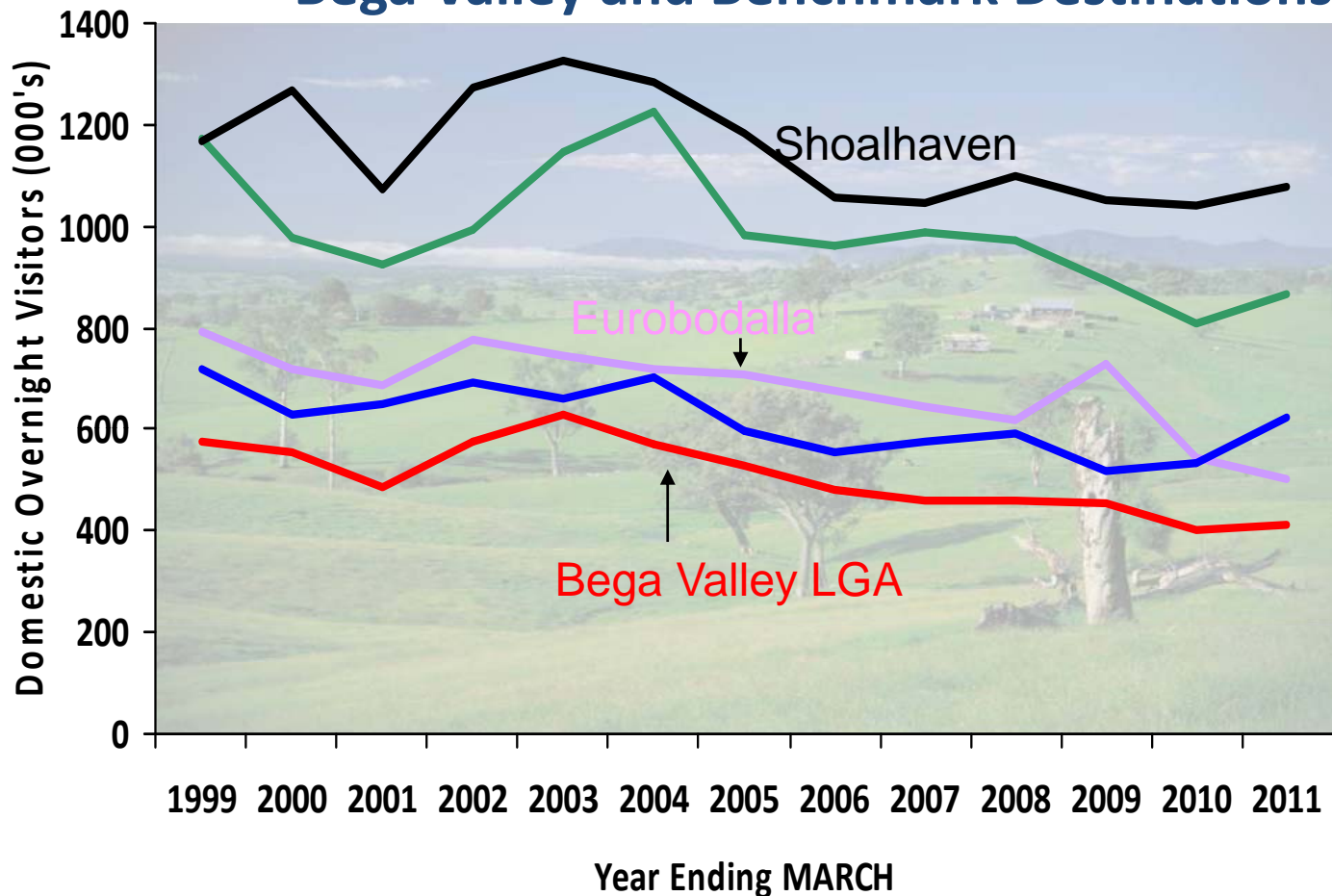
International Data

- **Tourism Research Australia's International Visitor Survey**
 - Annual sample 40,000 departing, short-term international travellers.
 - In the departure lounges of the major international airports
 - Weighted to ABS Overseas Arrivals and Departures data



Tourism New South Wales

Domestic Overnight Visitors to Bega Valley and Benchmark Destinations



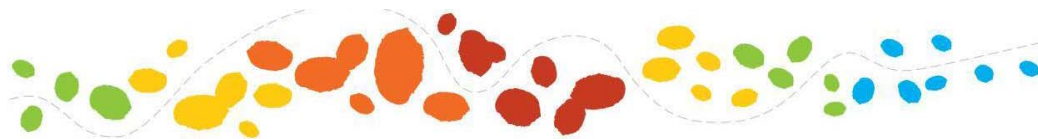
Melbournians to Bega Valley: steeper decline than other source markets

Decline in visitors from 2003, 2004 for Bega Valley and benchmark destinations .

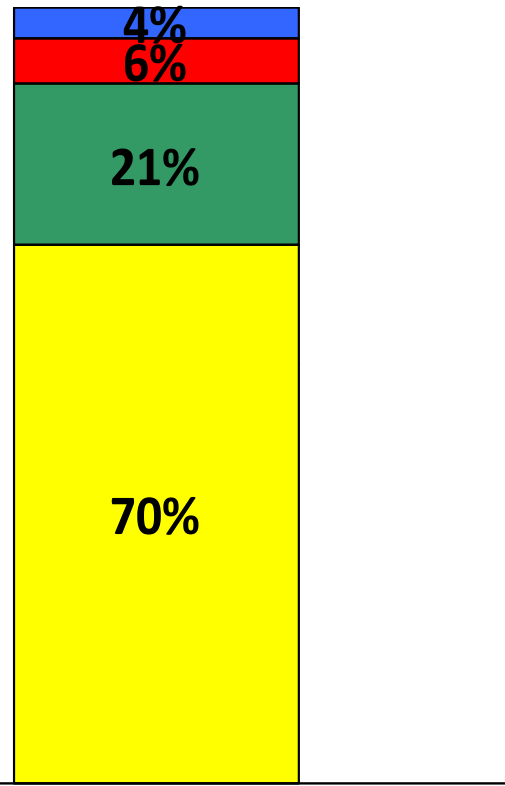
- Bega Valley (A)
- Coffs Coast
- Eurobodalla (A)
- Shoalhaven
- Gippsland Lakes

Bega Valley Visitor Profile

- Purpose of Visit
- Origin
- Travel Party and Age
- Accommodation
- Activity



What is the purpose of visit of visitors to the Sapphire Coast?



■ Holiday ■ VFR ■ Business ■ Other

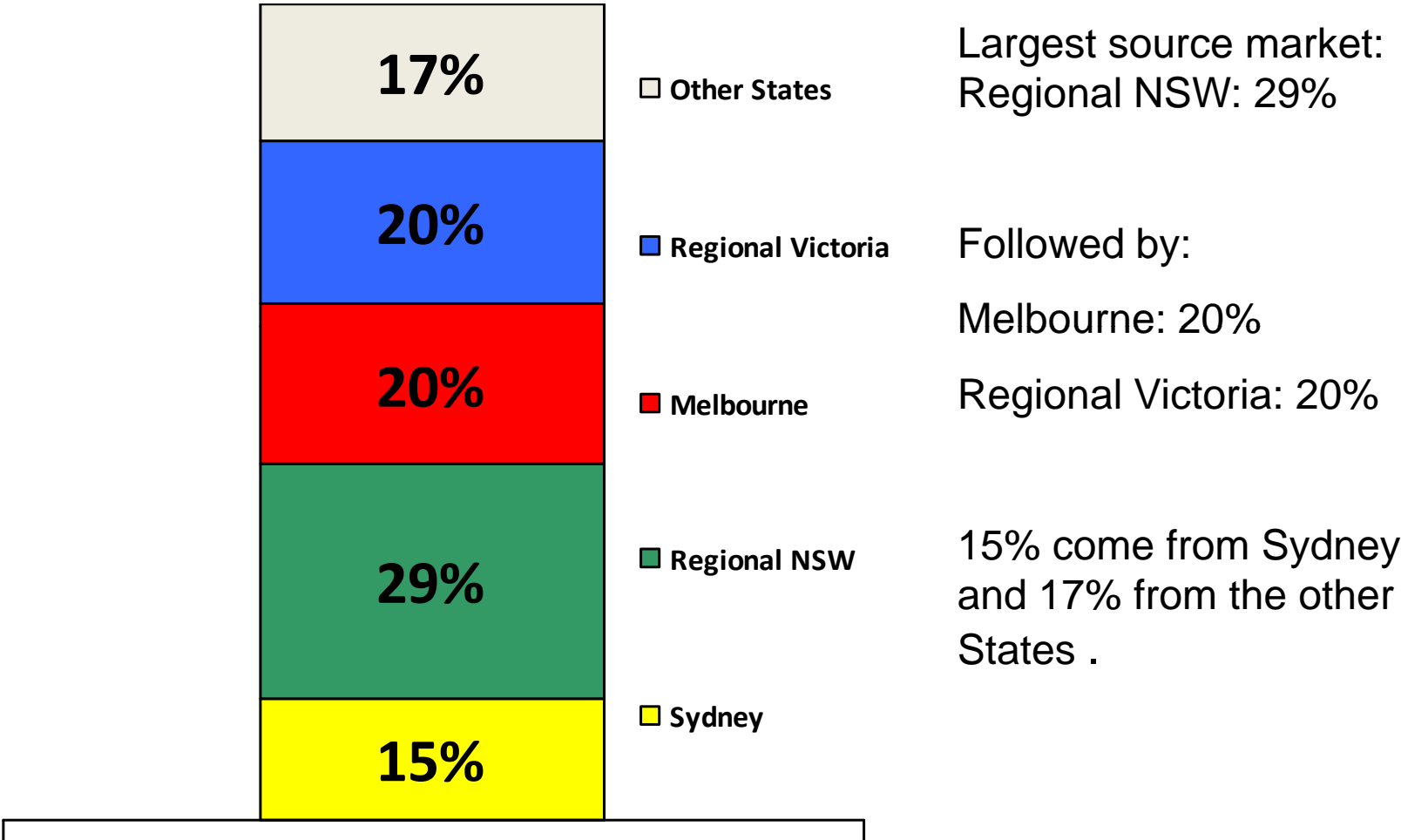


Almost three quarters of visitors are on holidays

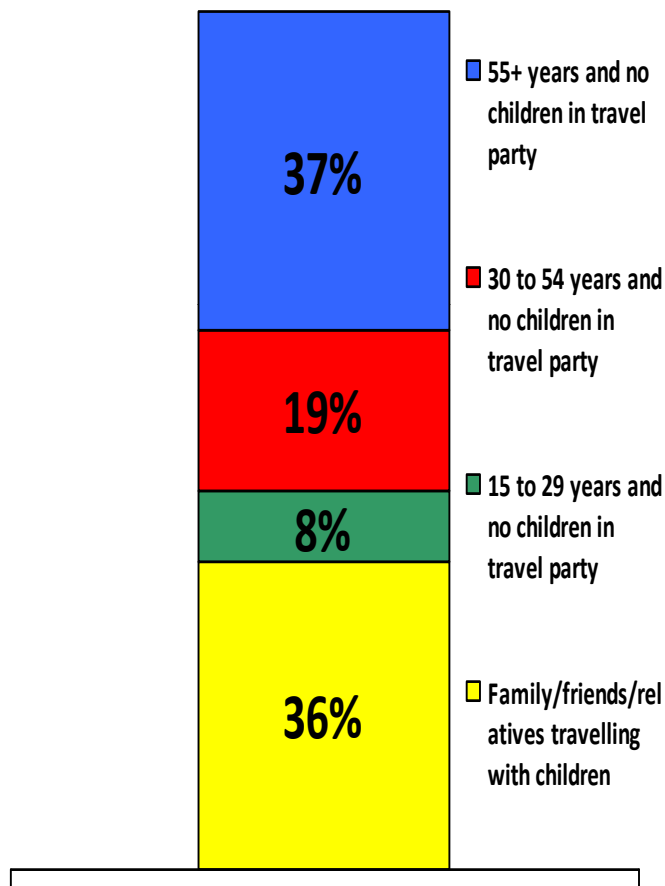
One fifth are visiting friends and relatives



Where do visitors to the Sapphire Coast come from?



What is the age and travel party of a visitor to the Sapphire Coast?



Largest groups:

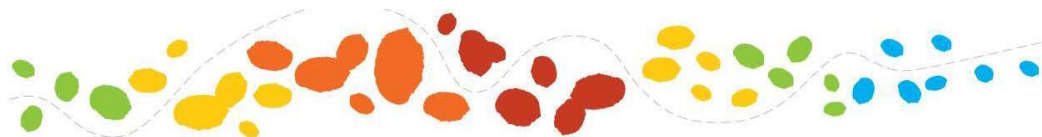
Families: 36%



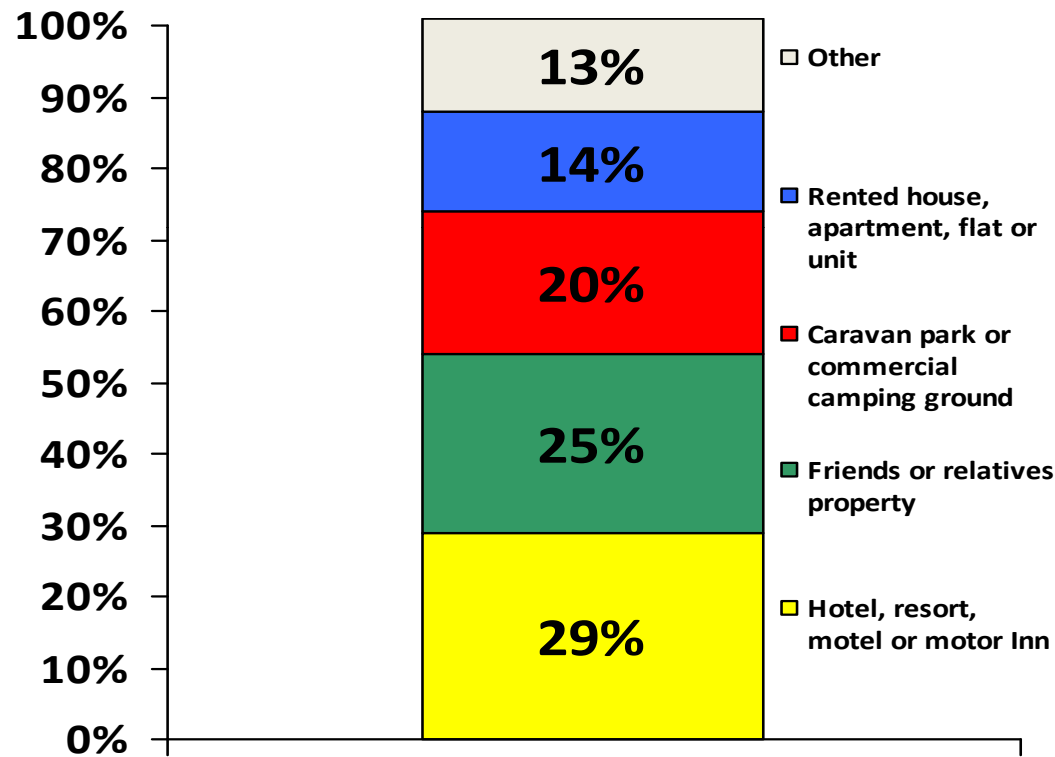
and those over 55+ yrs: 37%



Together these two make up three quarters of the visitors .



Where do Sapphire Coast visitors stay?



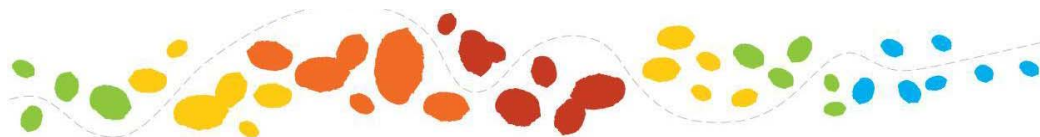
Most popular Hotels etc: 29%



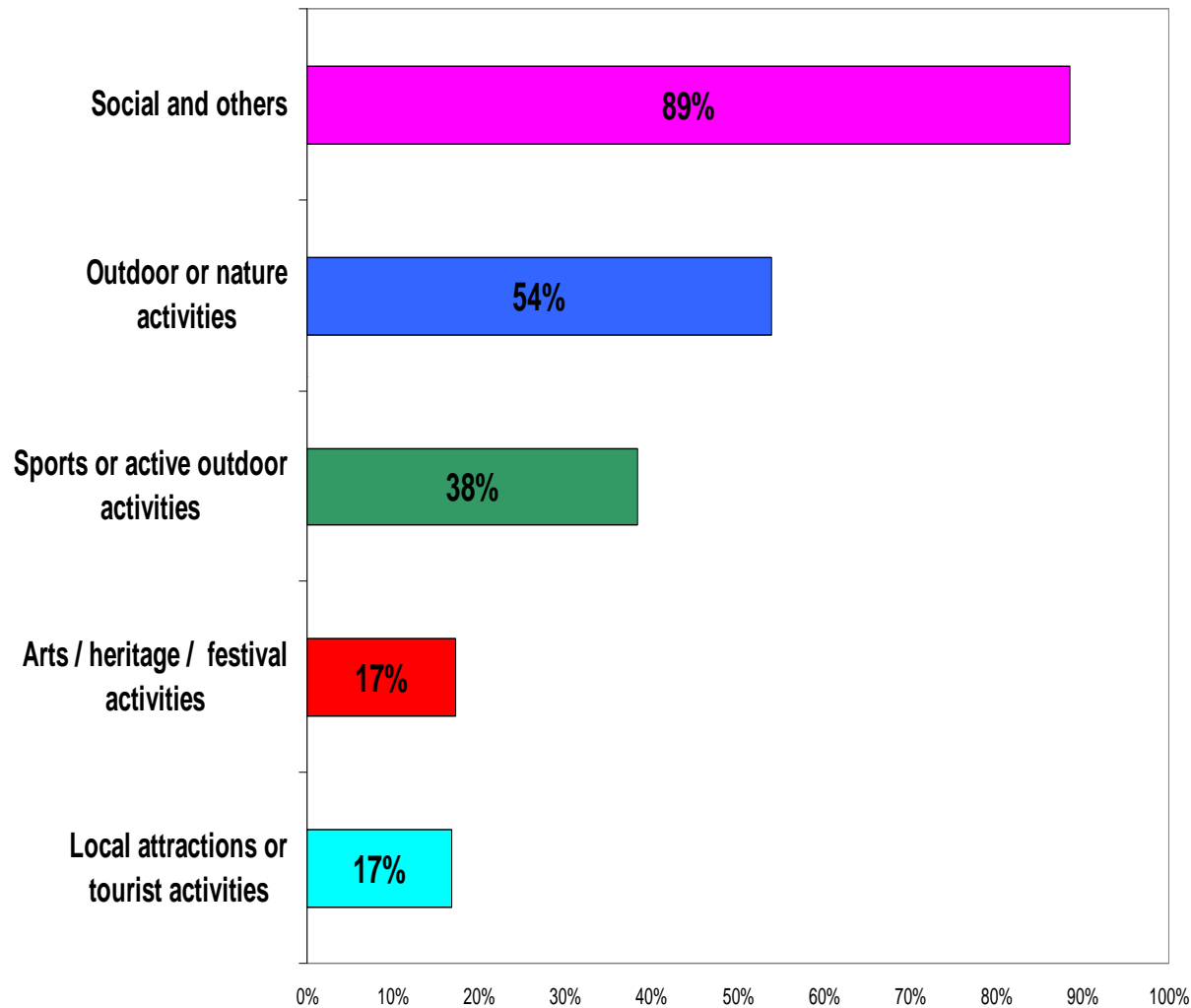
Followed by:
Friends/relatives property: 25%



and caravan parks: 20%



What do visitors to the Sapphire Coast do?



Social and other activities:

57% eat at restaurants

42% general sightseeing

30% visiting friends and relatives

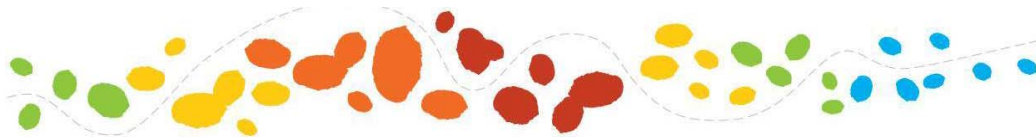
27% shopping

Outdoor or nature:

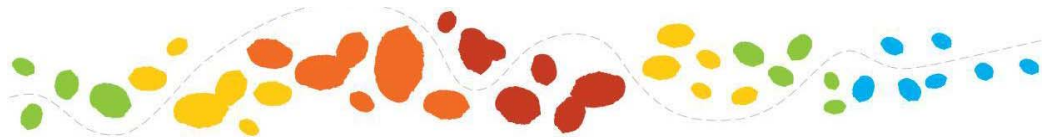
45% go to the beach

Sports or active outdoor:

20% fishing .

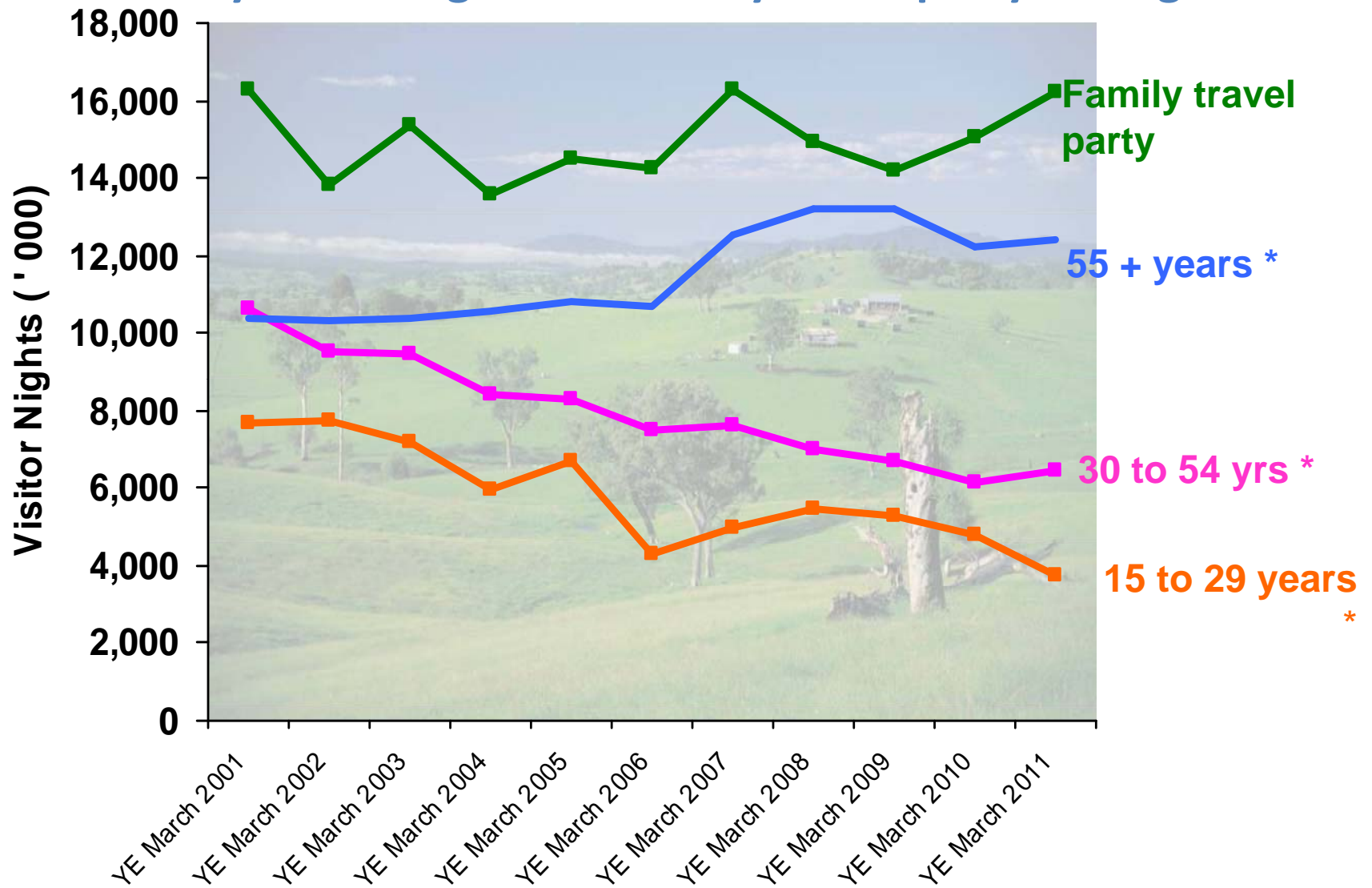


General Tourism Trends



Who is holidaying in NSW?:

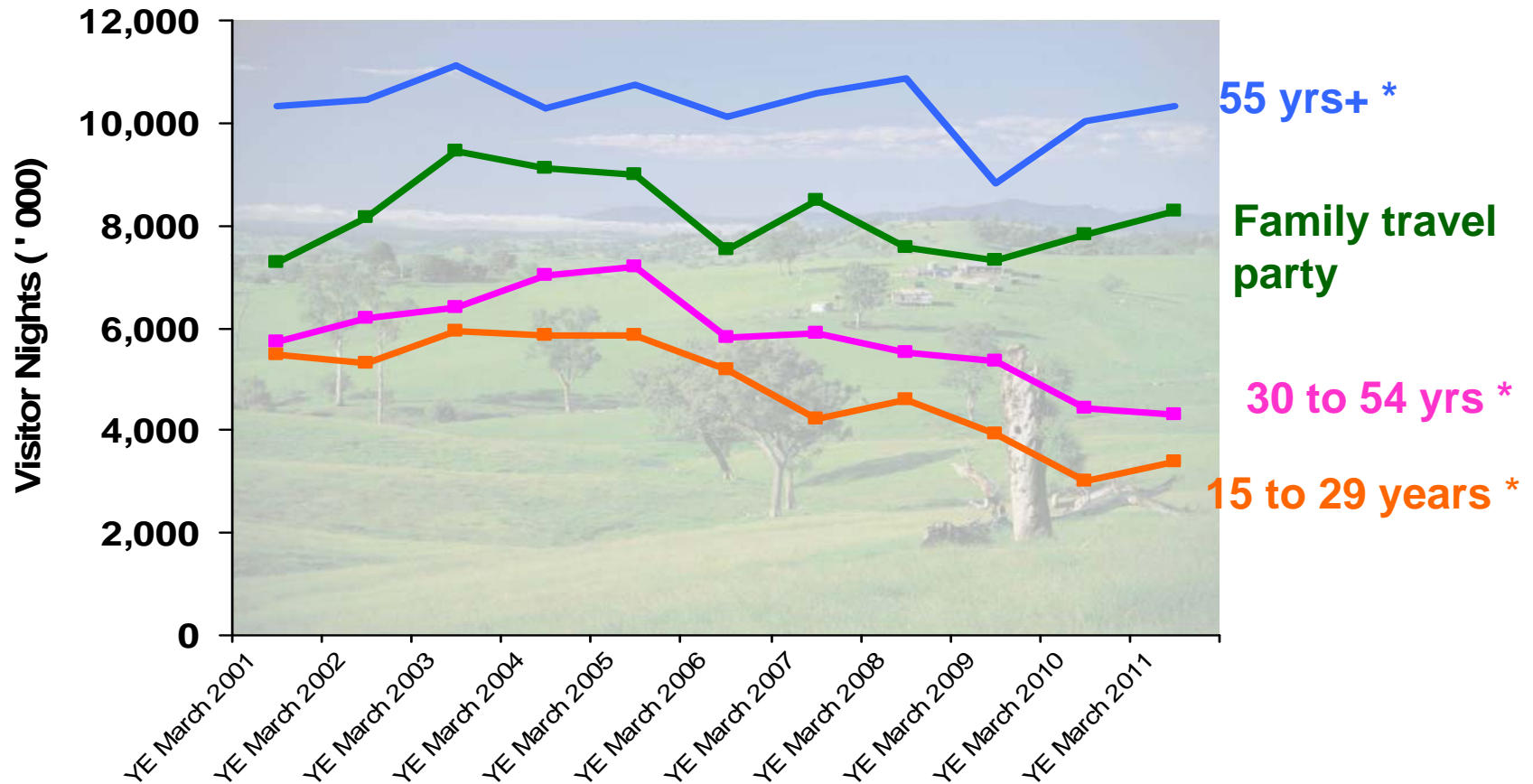
Holiday visitor nights to NSW by travel party and age



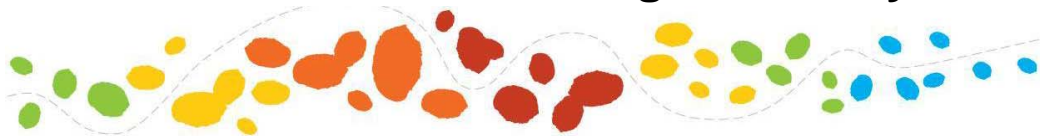
* Not travelling in a family travel party



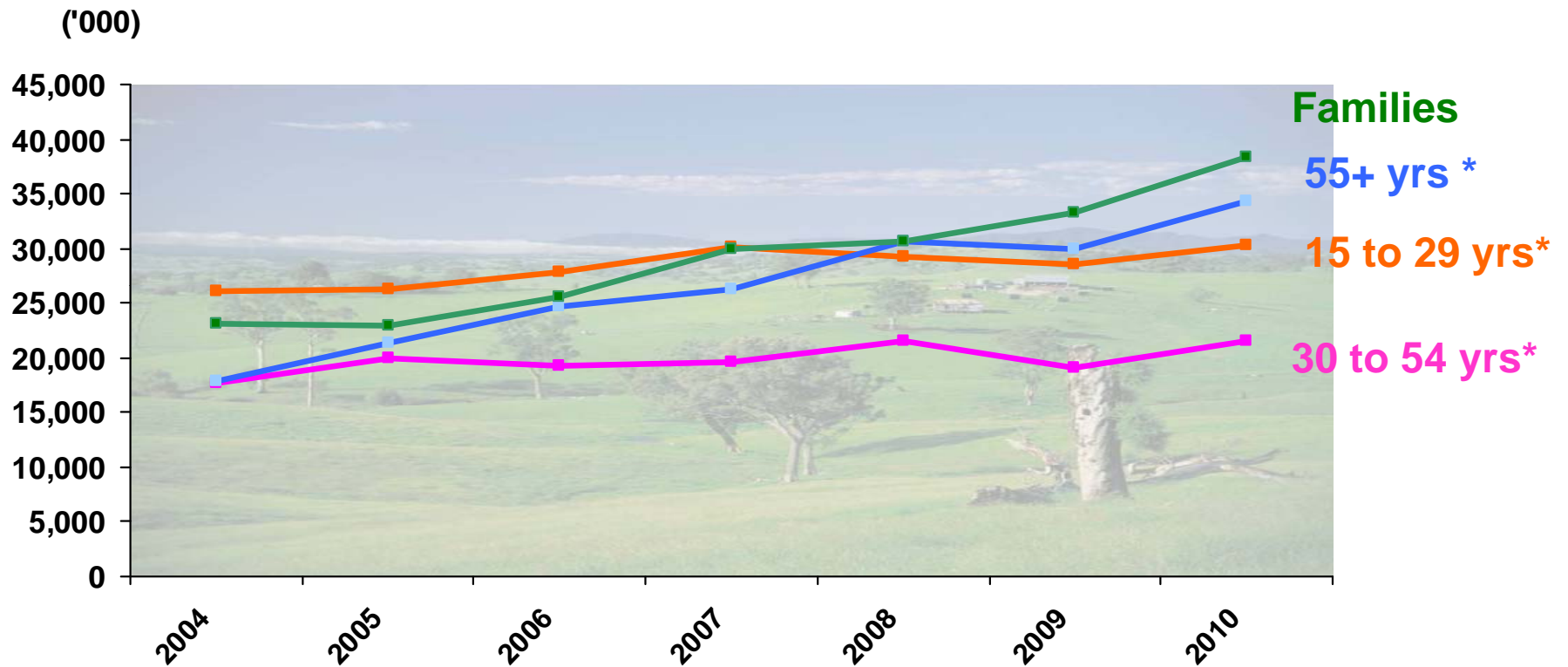
Who is visiting their friends and relatives in NSW?: VFR visitor nights to NSW by travel party and age



* Not travelling in a family travel party



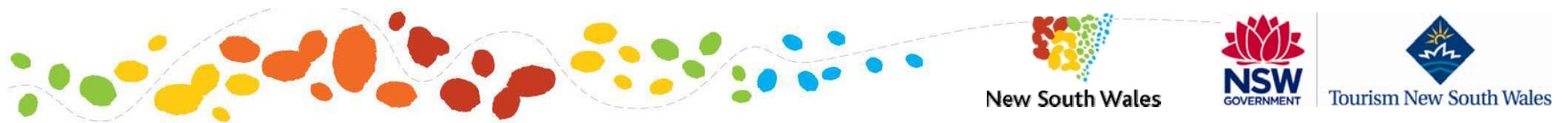
Who is travelling overseas?: Outbound nights by Australians



* Not travelling in a family travel party

General Consumer Expenditure:

What has changed?





58% of
Australians are
putting their
spare cash into
savings

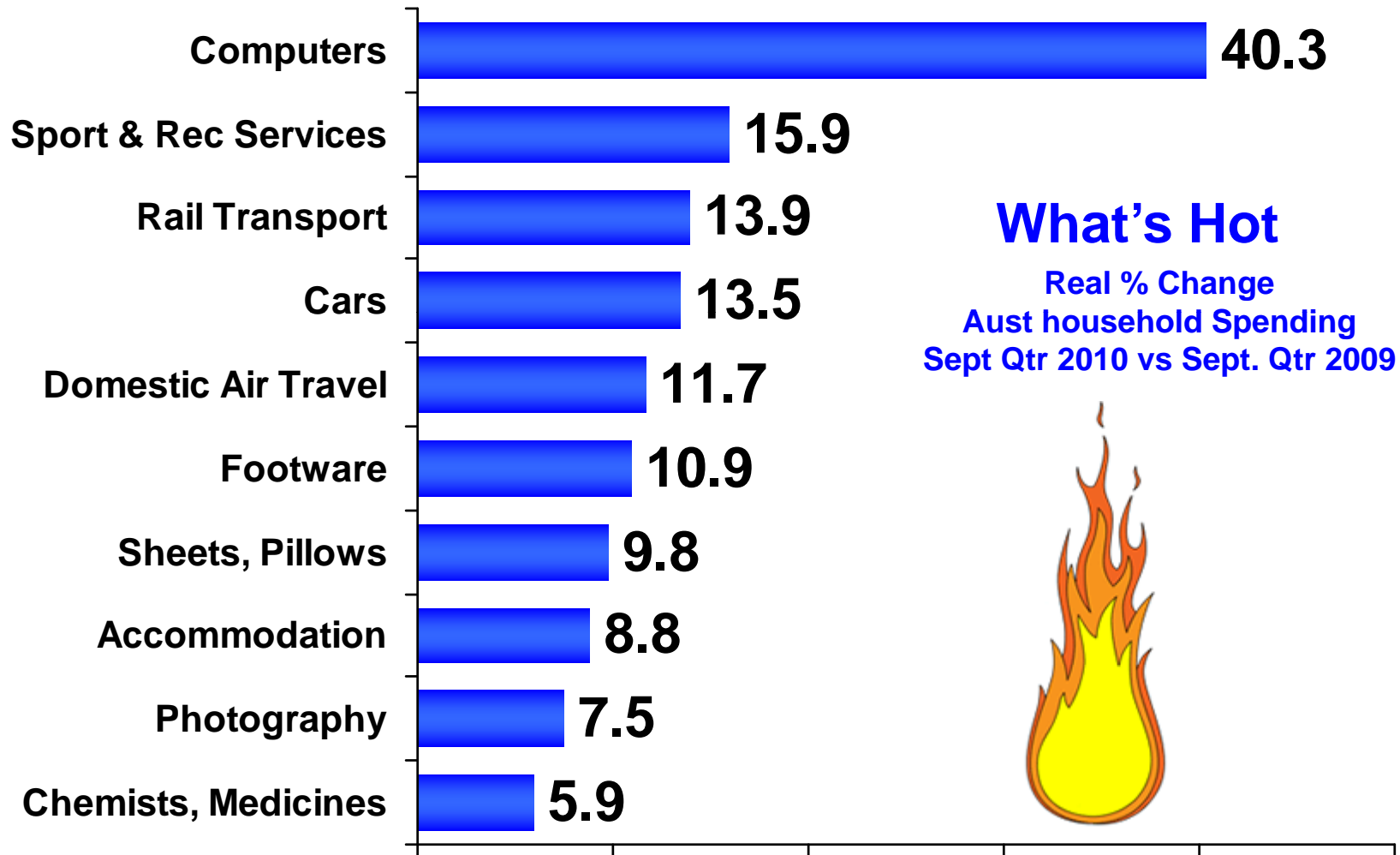
Households now saving
10% of their disposable
income

1980's: 15%

Early noughties: -2%

Low interest rates,
Using house equity .

Consumer Spending in Australia



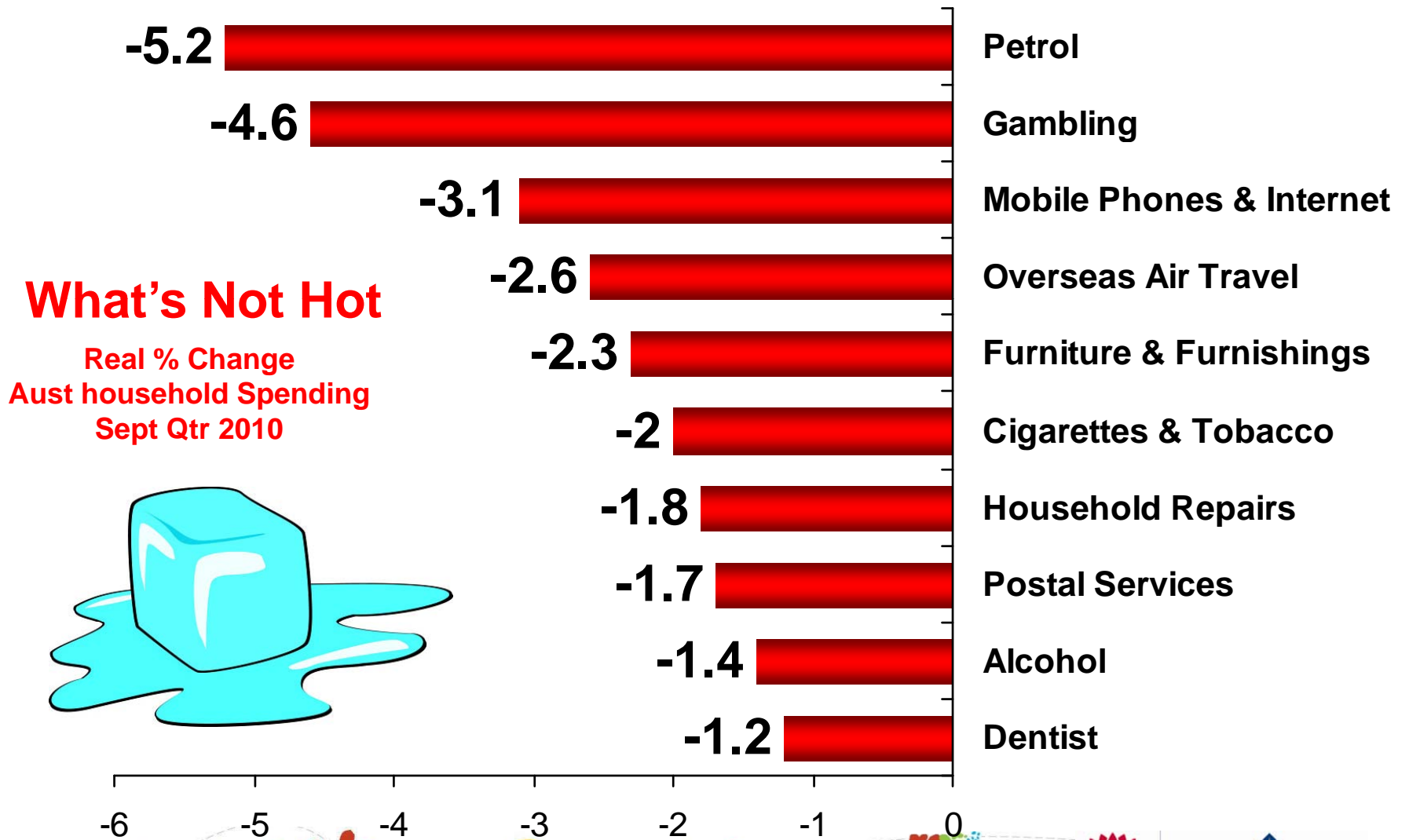
What's Hot
Real % Change
Aust household Spending
Sept Qtr 2010 vs Sept. Qtr 2009



Source: CommSec Economic Insights, Dec 1 2010

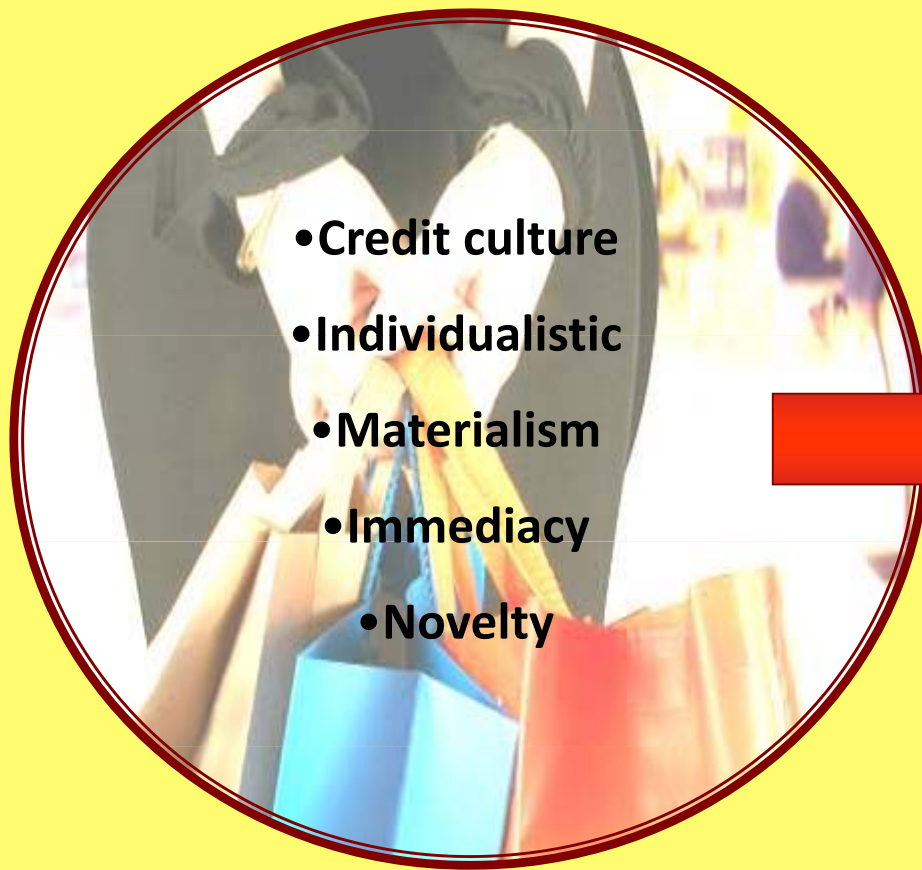


Consumer Spending in Australia



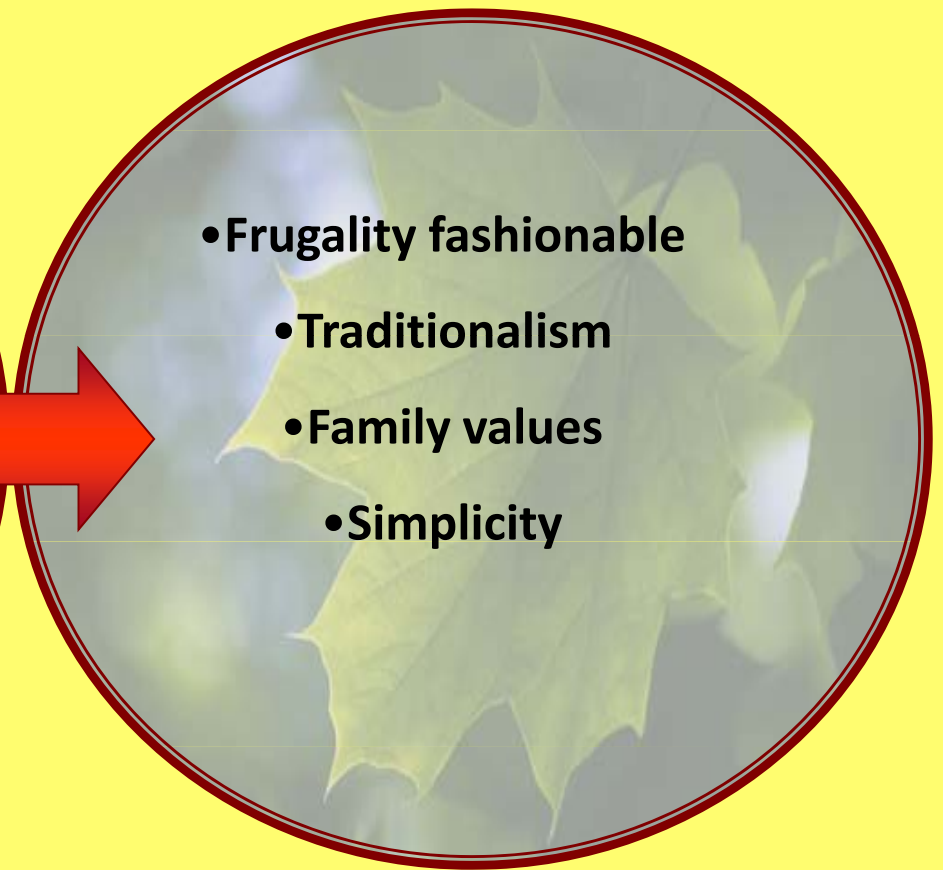
Source: CommSec Economic Insights, Dec 1 2010

Post GFC: Shift in Australian Mindsets



- Credit culture
- Individualistic
- Materialism
- Immediacy
- Novelty

Materialism



- Frugality fashionable
- Traditionalism
- Family values
- Simplicity

Conservatism

Slide Adapted from Domesticite 2010 by TNS



Tourism New South Wales

Thank You

- For more information contact:

Ruth Morris

Senior Analyst

(02) 9338 6644

Ruth.Morris@business.nsw.gov.au

