

January - March 2018

Quarterly Report



destinationtweed

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Tourism Industry Forum AGM & Networking Event



The future of the Tweed as tourism destination is bright.

We are pleased to invite you to be part of our new strategic direction by

Attending any or all of the following events

12:00 The Industry Development Forums to learn about new opportunities for your business (Ticketed Event [Book Here](#))

5:00 pm The launch of our new strategic direction and new destination brand followed by the

Destination Tweed AGM @ 6 pm (FOC [Register Here](#))

6:30 pm Destination Tweed Industry Network Event (Ticketed Event – [Book Here](#))

Date: Wednesday 7th March 2018

Events commence at 12 noon.

Location: Fins @ Plantation House, Tropical Fruit World

13 Duranbah Road, Duranbah, NSW 2487

Destination Management New Strategic Direction Launched at AGM

The change in leadership and approach late in 2017, along with the industry and stakeholder consultation and engagement undertaken during the Destination Management Planning (DMP) process, has provided an opportunity for the organisation to review both its operations and the strategic direction. The AGM provided an opportunity to bring the industry and stakeholders together. For industry it was a chance to learn and update skills in digital, marketing, experience development and export. For the organisation it was an opportunity to test the new strategic intent, branding and future direction being proposed.

The Tourism Industry Forum topics were well received with high or very high levels of satisfaction and strong demand for more training programs in the areas marketing, digital, food tourism and export. Training programs and industry development programs will commence in June 2018.

The DMP Strategic Intent and new Brand Strategy and The Tweed word mark were shared with industry in the forum immediately prior to the AGM with excellent feedback and support for the new approach. Launching the new creative style using two photographic styles to feature Nature, Food and Creative with a strong and contemporary word mark was praised and supported by those in attendance. This allowed DT to move forward with confidence to partner with TSC Communications and Economic Development teams to form a Brand Management Group and recommend the new Tweed Brand to TSC for adoption. Trademarking process are underway and brand guidelines will be developed by the Brand Management Group to ensure the word mark is protected and used appropriately.

GOVERNANCE

Destination Tweed Ltd AGM

The organisation transitioned from being an incorporated association to an ASIC registered company limited by guarantee in 2017. The 2018 AGM was the first under the new structure and reporting requirements. In addition to the election of directors, a number of constitutional changes were made to improve the operation of the company. The most notable for TSC is the change in the representation on the DT Board of Directors, which has been automatically allocated to the Mayor. After consultation with both the Mayor and the TSC GM, DT board put to the members that the constitution wording be amended to allow representation from Tweed Shire Council on the Board of Directors as follows:

“Councillor and an alternate Councillor as nominated by the Council and General Manager, as an appointed non-voting director” This was done to ensure that TSC had some flexibility in nominating a representative to the board and could minimise the risk of perceived conflict of interest.

Board Elections

After more than 15 years of service between them, Aymon Gow and Charles Martin stepped down from the Chair and Deputy Chairs roles to focus on their professional roles and to allow for renewal of the board.

3 directors were nominated and assessed by the assessment panel and offered to the membership as new board members.

- Peter Burr (Marketing & Restaurant)
- Paul Prout (Marketing & Club Industry)
- Frank Gyzemyter (Management, Governance & Airline Industry)

All three were unanimously welcomed to the DT Board of Directors.



Destination Tweed Ltd Annual General Meeting 2018

Welcoming some of the new board members

Executive roles were determined by a board voting process immediately following the AGM. Mr Darren Wright was elected as Chair, Ms Kylie Milroy elected as Vice Chair and Ms Belinda Hall elected as Secretary/Treasurer.

Chair's Report 2018 AGM

2018 sees Destination Tweed (DT) start the final year of our existing contract period with Tweed Shire Council. In the last 12 months we have seen a greater collaboration with industry, community groups and our surrounding regions than ever before. Delivered training for our industry to up skill and have been the advocate for developing the tourism experience of the Tweed.

Financially the organisation is sound as outlined in the Treasurer's report. We retained a net profit of \$62,000 at year end which is budgeted as expenditure in the financial year ahead to achieve our goals.

Chair's Report 2018 AGM Continued

There have been some challenges in the year since our last AGM, March 2017 saw the worst flood in Murwillumbah for 100 years and the Murwillumbah Visitor information centre and DT administration office were underwater. We thank the staff and volunteers for their tireless effort in cleaning out the office and VIC post flood and for their commitment in this time. As a result of the flood Tweed Shire council allowed a move of the VIC to the Murwillumbah Train station which has been a positive result to date with good parking available and off street signage clear for travellers.

The year has seen many notable achievements:

Company Limited by Guarantee:

DT has made the transition from a not for profit Incorporation to a not for profit Company Limited by guarantee. This was a transition requested by the department of fair trading and allows us as a member organisation to pursue further commercial outcomes other than the contract we deliver for council. Profits from these commercial activities can be put into further marketing above and beyond our budgeted activity.

New Membership Structure:

DT has returned to a larger membership model giving ownership of the entity to the industry it represents, this has been a positive message to the members and embraced by the industry.

Chief Executive Officer:

DT welcomed a new CEO in Rose Wright contracting to DT through her business Knowledge Transfer Services, we thank the outgoing CEO Bill Tatchell for his efforts and look forward to the year ahead under Rose's leadership in the position.

Destination Management Plan:

The organisation has delivered two key strategies being the Marketing strategy and the 1st draft of the Tweed Destination Management Plan (DMP), the DMP writing process has seen stakeholder engagement across the shire to align industry and community expectations with key performance criteria for tourism in the Tweed. We look forward to working with council and industry to achieve the outcomes detailed in the DMP.

The Tweed Brand:

As you have seen from the presentations from just prior to the AGM, the focus on developing the marketing strategy has seen significant progress with the development of a new brand for the Tweed which will be rolled out in 2018 in partnership with Tweed Shire Council. This is an exciting step for the industry as a whole and we look forward to our operators embracing the brand, delivering on our brand promise and sending a clear and united message to market.

Agri-Tourism:

DT ran a research project through the year looking at agri-tourism opportunities and development within the Tweed. During the stakeholder engagement process of the research many needs and wants of the industry and community were brought to light and detailed as initiatives to be actioned by DT going forward. From this a Food and Agri-tourism group has been formed which is a very important step in the development of the Tweed as a food destination.

Media Highlights:

The Tweed welcomed channel Nines "Today Show" shooting from the Tweed Regional Art Gallery, the morning made for the best exposure of the Tweed

Chair's Report 2018 AGM Continued

Collaboration:

The team has been working closely with partners on both sides of the border and establishing strong working relationships with Council, DNSW and Destination North Coast Network, Connecting Southern Gold Coast and TEN group these and other emerging relationships with the airport and major events are and will continue to paying dividends back to our industry our community. The focused effort on developing our relationship with Destination NSW is yielding results with our region being showcased as a business events destination and as a food destination with the Tweed hosting the significant NSW Happy Hour event at the Australian Tourism Exchange in Adelaide. Where our best food and drink and local chef's will stand out amongst some of the best food and wine regions around Australia.

A key priority in 2018 will be to establish a cross border agreement to ensure The Tweed can collaborate with both Queensland and NSW and leverage our unique position and proximity to Gold Coast Airport.

Whilst we have enjoyed some excellent growth, the strategic focus on growing yield over volume, offering remarkable and authentic experiences and delivering our brand will ensure that the Tweed will reach its true potential as a naturally beautiful, highly desirable tourism destination.

As a board group working with the CEO we are pleased with the positioning of Destination Tweed Ltd and look forward to our members

support as we work toward a tender process to renew our contract with Tweed Shire Council. The DMP process has put together a clear strategy and framework for the future development of the Tweed tourism industry which is now contributing over \$496.6 million to the Tweed economy. I thank my fellow board members for their efforts in the year and on behalf of the board thank our leadership group, the operational staff, volunteers and industry for the work they have put into growing the Tweed's tourism industry.

Aymon Gow

Chairman

Destination Tweed Ltd



Financial Management and Policy Review

Audited accounts were presented to the annual general meeting with quarterly financial statements now being provided to Tweed Shire Council in a confidential report. Revenue from sales in Tweed remains stable, however the relocation of the Murwillumbah and Kingscliff VICs to temporary accommodation continues to challenge our ability to trade and sell.

Income from cooperative marketing is higher this quarter, as publications and campaigns commence. Additional revenue from grants and external projects is providing the ability to replace assets lost in the flood and refresh imagery and video content in line with the new strategic marketing focus.

Policy Review

An internal review of policies and processes identified opportunities to refresh and refine policies to ensure they aligned with best practice in good governance. Policy review is underway with the intention of completing this first round of policy reviews by 31 May 2018.

Industry Development Activity

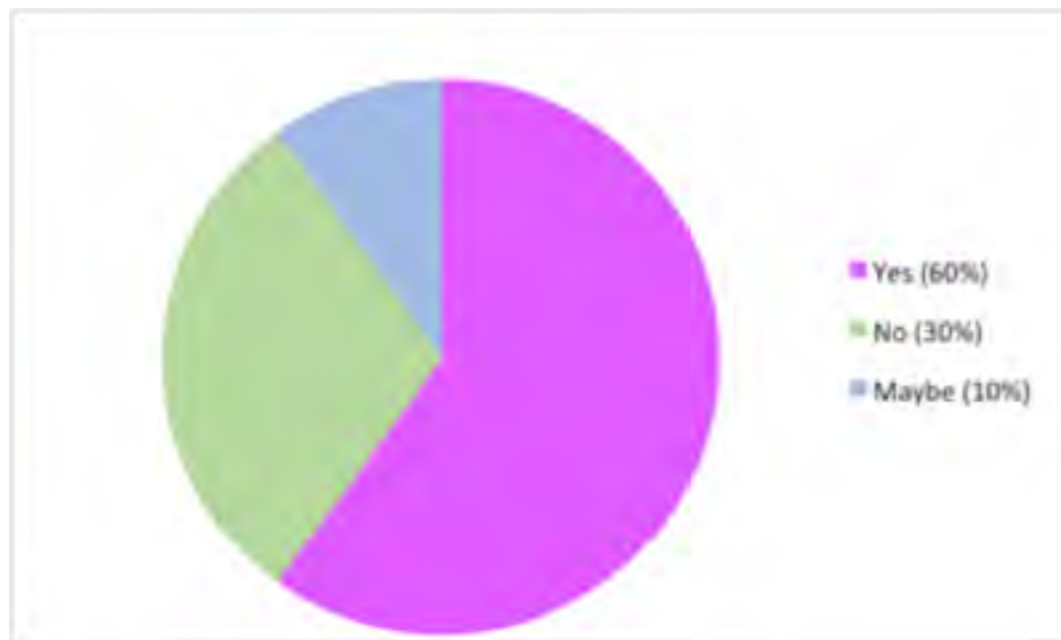
Destination Tweed used the AGM as an opportunity to bring together industry members and experts in key areas such as Marketing and Digital; Export Readiness and Food and Agritourism.

Three programs were delivered with expert speakers from the region, Gold Coast, Brisbane and Sydney providing the latest in these areas.

Attendees were asked to provide feedback on the content and their interest in follow up training in all three workshop areas. The overwhelming response was positive with most strongly agreeing with the quality of the content and information.

This format allows DT to identify where the highest level of interest and need lies with industry members. Follow up workshops will be scheduled in the coming months.

Would you like to express interest in participating in Destination Tweed's Export Program for your business?



Session Three: Getting Ready for Export Date: 7/3/18

What did you like most about the workshop?

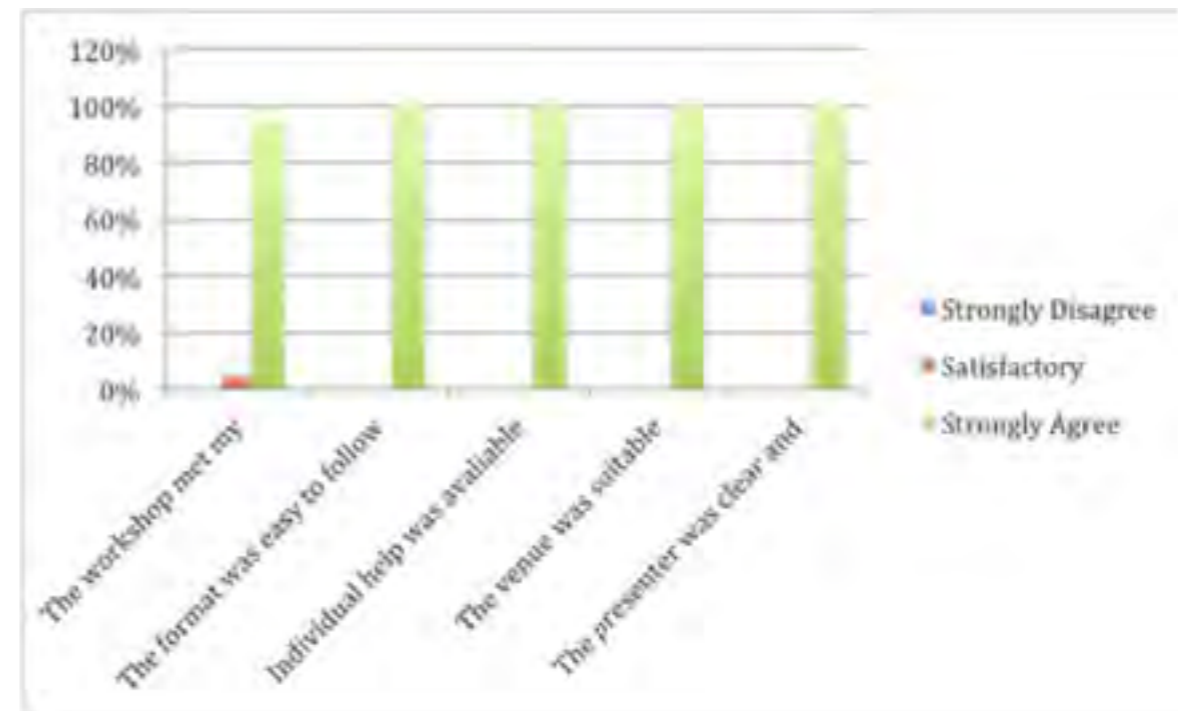
Speakers Michael Curtis and Janine Rees

Airline and Currency info

Very relevant and informative

Interesting insights for conferencing groups Fantastic and valuable information

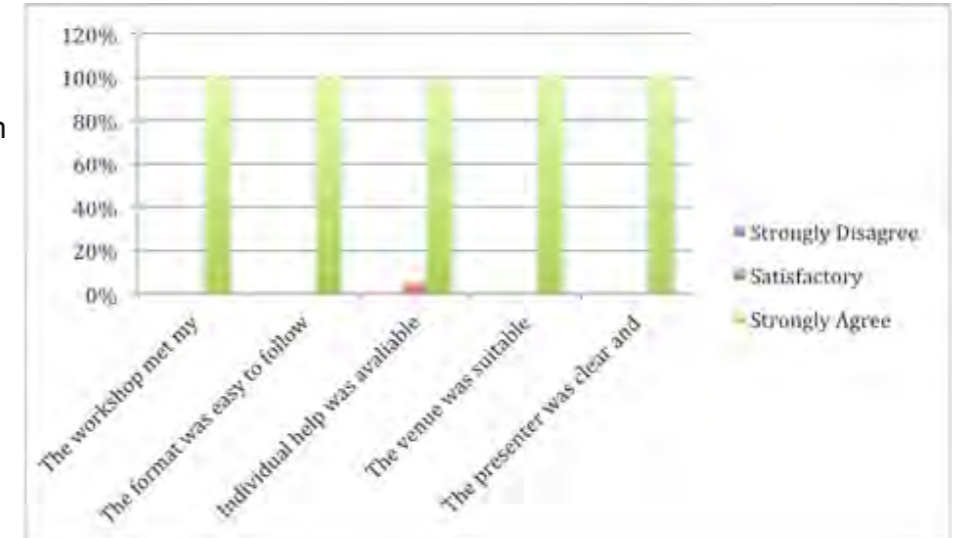
Great and different perspectives on the topic Great insights



Session Two: Food and Agritourism Panel Date: 7/3/18 Attendees: 30 attendees with 18 surveys returned

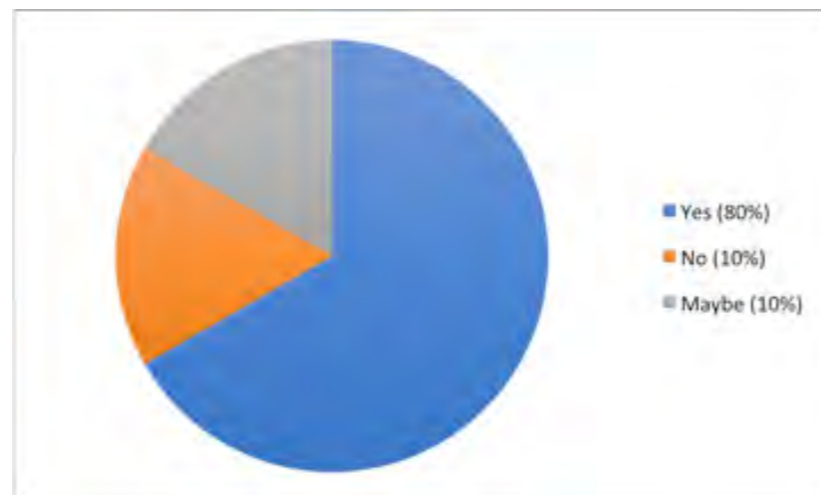
What did you most like about the workshop?

- Information on food networks and farm tours Exciting opportunity and plans for the region
- Information on food products and insights from restaurants Getting an understanding on future direction
- Update on Tweed Agribusiness
- Amy facilitated this forum very well and the speakers were very knowledgeable --- the workshop really hit the mark
- Great to see the connectedness happening --- driven by DT and the flow on potential for all areas of tourism, includ Practical information
- Great to know what is going on in the area in food



Further Comments: Would have like to have heard from more farmer speakers and Artisan food makers etc

Would you like to express interest in participating in our Food Tourism Program for your business?



What did you like most about the workshop?

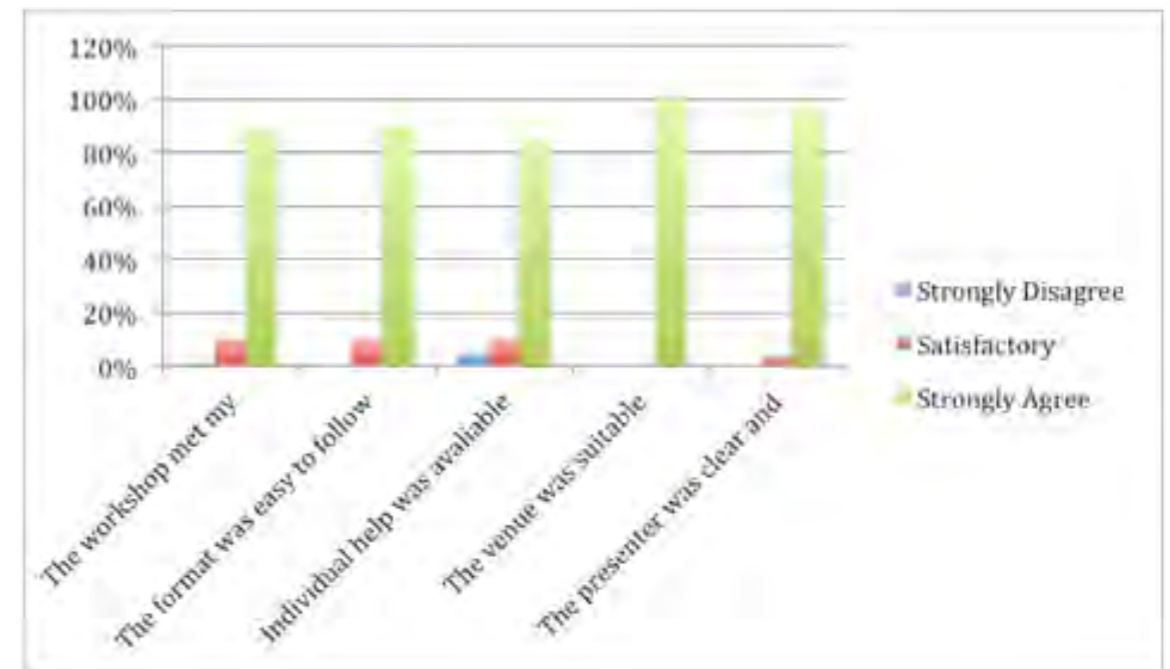
- Sharing information and ideas
- Informative about potential markets and exposure Relevancy
- Great leading ideas Direct, clear and concise
- Opportunity to meet local industry contacts Exceptional points to note
- The direction of Social media effectiveness in contrast to previous advertising effectiveness Liz was extremely informative and the strategy suggested seems simple and effective New information that has not been explored before
- Relevance to our existing efforts in social media Some Tweed Specific information
- Up to date and current information that was presented by Liz Excellent insight on what is current in the digital space
- The panel experience
- Social media -- google marketing
- Practical tips and strategies supplied by Liz Ward

What did you least like about the workshop?

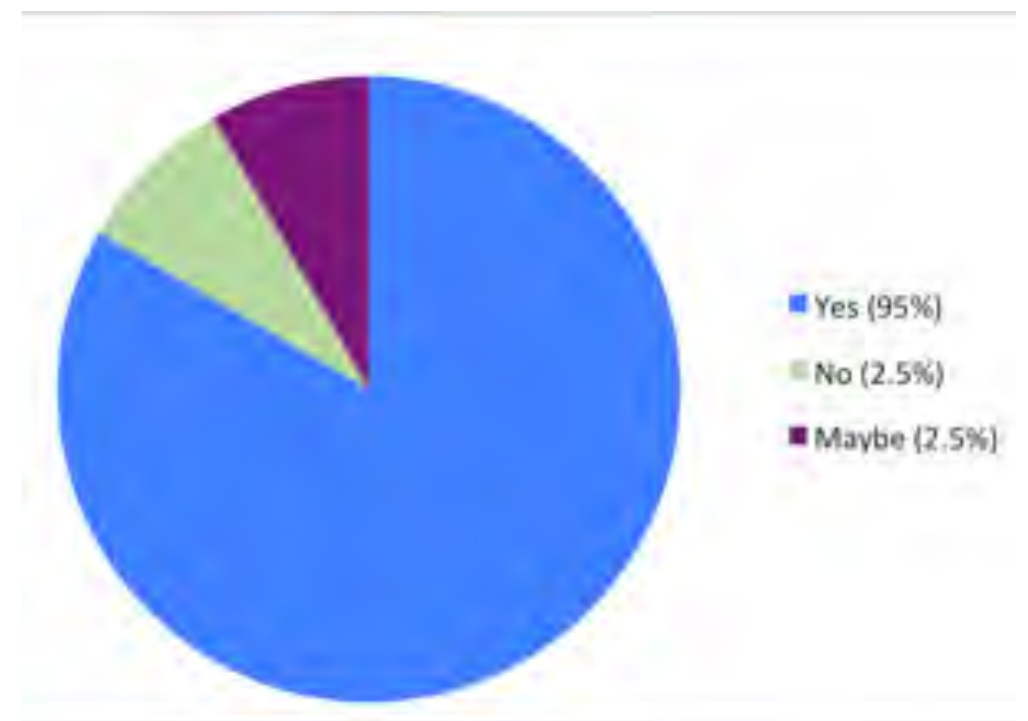
- Mark's presentation on what "not" to do Generic textbook info
- Case study would have been good
- Some context was very dry and did not drill down into key takeaways for small businesses
- Too many speakers -- would have loved a session on each Would like more question time

Further comments:

- Really excited for the future workshops Are the slides available?
- For this venue, you need a much larger screen for PowerPoint presentations



Would you like to express interest in participating in our Digital Marketing Program for your business?





THE TWEED

FIND YOUR
MOMENT

FRESH PRODUCE, STUNNING
SEAFOOD AND AN ENDLESS VARIETY
OF DINING OPTIONS MAKE THE TWEED
A GOURMET TRAVELLERS DREAM

PRISTINE BEACHES AND WATERWAYS, CHARMING VILLAGES,
ART TRAILS AND WORLD HERITAGE LISTED NATIONAL PARKS

VISITTHETWEED.COM.AU

Development of New Brand

The completion of the new brand has been a priority for 2018. Brand development commenced in late 2017 with The Tweed word mark being developed by DT marketing & creative team in partnership with TSC Communications and Eco Dev staff. The brand is accompanied by a new photographic style that will evolve over time. The photo concept has two contrasting styles. The first focuses on nature as the hero with little people in the frame. The second style is the opposite as it features very up close and personal hero shots of experiences relating to our food, creativity and naturally beautiful landscape and environment.

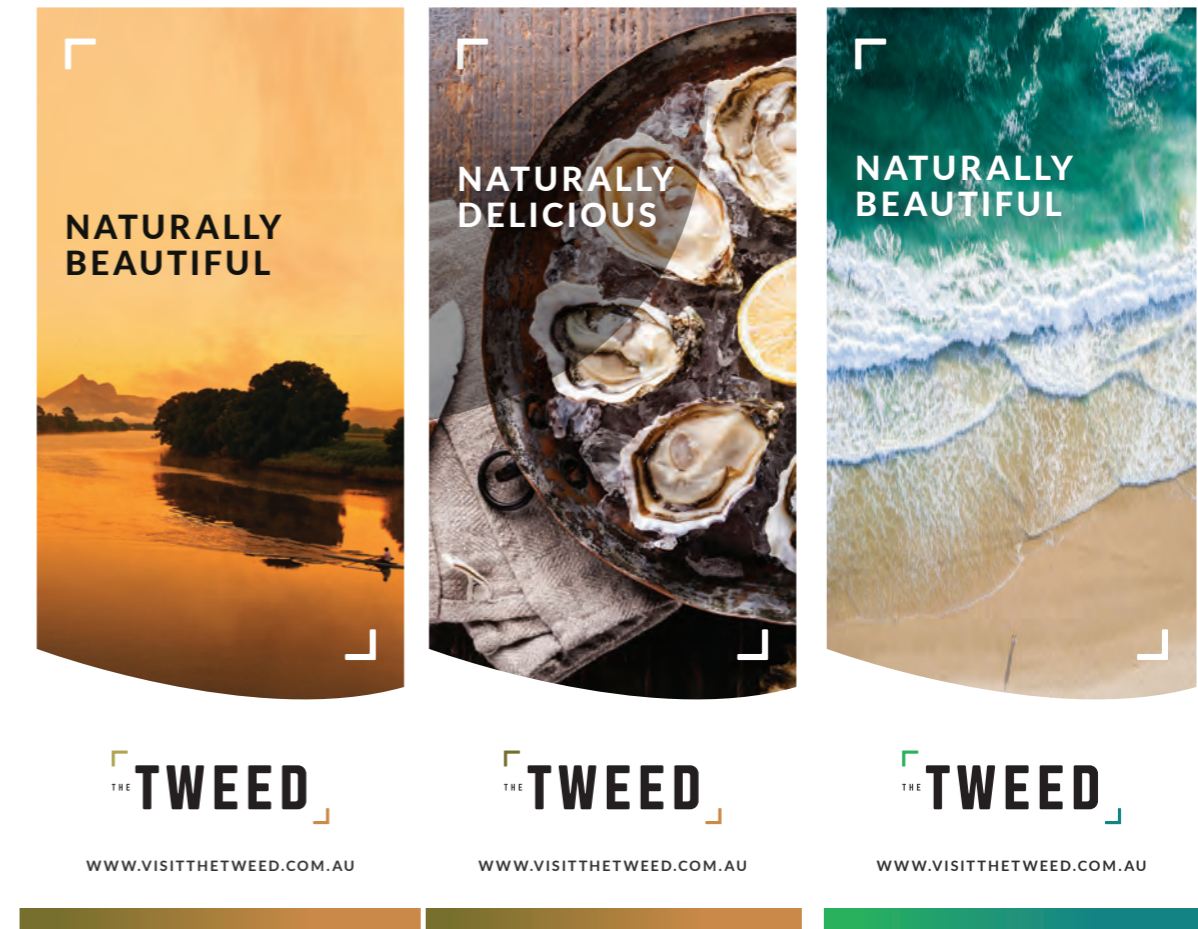
The concept aims to create an evolving library of high quality images through professional photographers and to also open source imagery from the community and visitors via social media. The campaign invites visitors to “find your moment” This allows for engagement and digital story telling to capture the an evolving library of imagery.

The brand is in the process of being trademarked by TSC communication team and a Brand Management Group has been formed to oversee the development of brand guidelines and curate its use to ensure it is used appropriately.

The 2018 Visitors Guide was finalised at the end of March 2018, in time for the Commonwealth Games. Whilst the guide has received very positive feedback, it is in a transitional format due to contracts for content being in place.

Summary of Industry and Stakeholder Outcomes

- ✓ A New Destination Brand Strategy
- ✓ Delivered New Brand Framework and work mark for “THE TWEED”
- ✓ Formed a Brand Management Group with TSC communications & EDO
- ✓ Completed the Destination marketing strategy
- ✓ Completed and submitted the draft Destination Management Plan that aligns with the North Coast DMP, and both the TSC Economic Development Strategy 2014 and the TSC Delivery Program 2017 - 2021
- ✓ Successfully submitted a bid for The Tweed to host be destination for the Australian Regional Tourism Conference in 2018
- ✓ Successfully submitted a bid for The Tweed to be NSW feature food destination at Tourism Australia's Australian Tourism Exchange focusing on our producers distillers, brewers and chefs
- ✓ Worked with the TSC EDO to deliver Succeed in the Tweed Business Investment Strategy and developed the draft prospectus using The Tweed Brand Framework
- ✓ Successfully pitched The Tweed as a business events destination to DNSW Regional Conferencing Team
- ✓ Hosted key staff on regional familiarisation tour.
- ✓ Established a Tweed Food and Agribusiness Industry Group
- ✓ Initiated discussions with National Parks re new walking trails to alleviate pressure off Wollumbin and to focus new investment in walking trails assets
- ✓ Extended relationships cross border with Gold Coast Tourism, Gold Coast Airport and Connecting Southern Gold Coast
- ✓ Supported and sponsored Murwillumbah Art Trail event
- ✓ Supported Earth learning through funding application for Cultural trail development in Murwillumbah.
- ✓ Continued to develop strong working partnership with Destination North Coast and Destination NSW
- ✓ Delivered several industry networking and professional development events in marketing, digital, export, food and agribusiness
- ✓ Created a partnership with DT, Byron Shire Council, Northern Rivers Food, DPC and RDA to deliver a cooperative approach to food and agritourism programs to help farmers become more economically viable through links to tourism
- ✓ Supported Tweed Chamber of Commerce in developing road side signage
- ✓ Negotiated with Gold Coast Airport to play Tweed video content streamed on airport screens during and after Commonwealth games
- ✓ Commenced a digital strategy for the destination marketing
- ✓ Delivered the AGM with record attendance numbers
- ✓ A range of high profile media articles in national publications



Above: New brand and style guide for The Tweed Pull Up Banners

Below: Export Brand



Major Events Sponsorship

Destination Tweed has had an ongoing relationship with Surfing NSW, through hosting two major events each year. The Tweed Coast Pro was held at Cabarita Beach from 31st January until 4th February, 2018. The event attracts global audience and participation. The table outlines the total number of participants and their origin. 93% of event participants are from outside the region. Whilst the event is significant, DT will work with Surfing NSW to further leverage opportunities for the Australian Surf Festival to be held in The Tweed July 2018.

Event General Attendees	Total number	From event region	From outside region but still within NSW	From Interstate	From Overseas
Total attendance numbers across the whole event (i.e. across all days and all sub events for each region).	613	41	199	227	146
Percentages of attendees from each location.	100%	7%	28%	36%	50%
How did you calculate the total attendance numbers?	Table 1 attendees is calculated from the total of table 2 and table 3.				



Business Events Attraction



MEDIA RELEASE

22 March 2018

TWEED TO HOST 2018 AUSTRALIAN REGIONAL TOURISM CONVENTION

Tweed has been announced as the host for the 2018 Australian Regional Tourism (ART) Convention to be held from Tuesday 23 – Thursday 25 October.

Australian Regional Tourism is the peak body for regional tourism in Australia. The Convention is a forum in which regional tourism practitioners can exchange ideas, discuss and debate some of the most important issues, challenges and opportunities facing regional tourism.

ART Chair, Simon McArthur said, “We’re excited that the ART Convention will be held in the Tweed for the very first time. The Tweed region offers fantastic flight accessibility through the Gold Coast Airport and a diverse collection of tourism experiences to showcase and discuss. We think Tweed will attract one of the highest number of delegates in years.”

Member for Tweed Geoff Provest said the four-day convention will provide the perfect opportunity to showcase the Tweed’s business event capabilities to high-profile delegates.

“With our state-of-the art business facilities, fresh local produce, beautiful beaches and World Heritage rainforest, we are delighted that the spotlight will be on Tweed this October as key decision makers from around Australia gather for the ART Convention,” Mr Provest said.

ART launches its 2018 Convention in partnership with the NSW Government’s tourism and major events agency, Destination NSW. Key themes will include improving regional dispersal, agritourism, nature-based tourism and visitor servicing.

“Destination Tweed is proud and excited to be hosting the Australian Regional Tourism Convention, the Tweed is perfect the place to showcase this years conference themes” said Rose Wright of Destination Tweed.

An innovation to this year’s program will be a suite of interactive workshops on hot topics. Delegates will have the chance to enter a competition and receive recommendations from experienced facilitators on the various tourism issues relevant to their region.

The Convention theme is ‘Pushing the Boundaries’.

Delegates to ART Conventions come from local government, regional and state tourism organisations and a raft of private sector businesses that service their needs.

You can register interest through the ART website <http://regionaltourism.com.au/index.php/convention-2/> and early bird registrations will open in early April.

-END-

MEDIA CONTACT

Belinda King, Executive Officer, ART on **M:** 0402 199 347 or **E:** admin@artn.com.au

Public Relations and Media

January PR & Media Summary

- Media release for Summer on the Tweed
- Update and collate media compilation list
- Liaise with DNC and devise trade sheet/fact sheet update
- Attend DNC comm games Byron event
- Liaise with GCAT image request pre comm games
- Meeting with Falls Fest/Nth Byron events for future events, site inspection
- Social media schedule summer holidays and events
- Image file collation
- Photo shoot Ryan Fowler, update library.
- Send DNSW images and updates
- Develop itinerary for ATE prospects with Flo/DNSW
- Media release circulation Tweed Coast Pro, social media, event support
- Member updates and meetings
- Rees international proposal handover AS
- Marketing assist Alicia, advertisers, printer referral
- Santai meeting and accommodation packages
- Travconsult proposal and image request
- CSLSC country champs and IRB event
- GCT/GoldOC liaise for Tweed familiarisation tour
- Liaise TSC comms, activate Meltwater
- Liaise TSC events, Tweed Coast Pro
- Marketing/Team meetings AS
- Discover Tyalgum meeting and events
- PR schedule update, WIP file and Sharepoint update
- ATE list for AS, booking schedule
- Media release for Salt Village

February - March PR and Media Summary

Published Media Compilation List	Industry, Stakeholder and Community PR Activities	New Membership or Partnerships Created	Media/Trade Famil Activity
<ul style="list-style-type: none"> - *Herald Sun-Business 26/2/18 - Blank GC- MAT 27/ - Australian Financial Review-8/3/18 - Visit NSW-SM 9/3/18 - *Herald Sun-Traveller 12/3/18 - *GC Bulletin-Taste 16/3/18 - *Byron Shire News-Harvest 27/3/18 - ABC Nth Coast-live broadcast 29/3/18 	<ul style="list-style-type: none"> - Media Mavis/Husk events - GC Airport- show reel Commonwealth games/ Asia Summit - Twin Towns- Digital wall, source footage - DNSW/DNS/TFW/DT/ operators - Social Media Marketing World-conference, SM report, workshop scheduled - ATE media scheduling/logistics - Image library collation - Ryan Fowler photo shoot direction - Sam Brincat creative brief-video - New Beach Media proposed campaign - Social Media schedule - Tweed Coast Pro Event Media & post report - Commonwealth Games- media centre, Optus - Tweed Produce sample bags, GCT events - Falls Festival creative proposal - DT AGM +Industry Forum/media 	<ul style="list-style-type: none"> - Nth Byron Bay - Parklands/Falls Festival - Gallery Motel - Mbar arts precinct - Blue Ginger Picnics - Healing Art Design - Cabarita Lake - Apartments - Event partnerships: - Surfing NSW - MAT 18 	<ul style="list-style-type: none"> - Urbanlist-Bombay - Cricketers Club - Jetstar, Taverna - Herald Sun, Bombay - Cricketers Club/KMS - Metropolitan London-DNSW - Qantas-DNSW - Honest Cooking-USA/DNSW

FINANCIAL REVIEW
 NEWS WEBSITE OF THE YEAR
 - LIFE AND LEISURE
 - Mar 6 2018 at 12:16 PM

Tweed Shire: Your dream holiday destination without the crowds

The tranquil Tweed Coast is blessed with abundant natural beauty and much, much more.
 Supplied by Ute Junker



Beyond Byron

There is more to the Byron Bay region in the hidden villages and rainforests of the Tweed Valley

WORDS CRAIG TANSLEY

There is a bridge painted in the colours of the rainbow outside the hippie hamlet of Uki, just up the road from a fourth-generation cattle farmer who sells "moo poo" for \$3 a bag. Around the corner there are glimpses of Mt Warning from the verandah of top regional restaurant Mavis's Kitchen. The star here isn't head chef Pepe though, it's Darth Vader, a big, black Muscovy duck who patrols the place like a dog. Northern New South Wales' most lauded art gallery (Tweed Regional Gallery and Margaret Olley Centre) is a 15km drive east, but I'm just as happy getting my culture fix at a

communal table at The Modern Grocer in Murwillumbah. Here writers, musicians and artists meet most mornings over coffee and turmeric lattes. "This is where we solve the problems of the world," says local writer Madeleine Doherty. "If you want peace and quiet you can sit out back with the water dragons."

While Byron Bay hogs the limelight on the Far North Coast of NSW, the hinterland that surrounds it is still overlooked by most travellers (with the exception of uber-trendy Bangalow). Visitors bypass The Tweed Valley as they beeline it to Byron from Coolangatta airport, but this is where you can experience

Australia's Rainbow Region without a hint of pretence (or any crowds). Empty roadways take you along the rim of an ancient volcanic caldera, through the World Heritage-listed Gondwana Rainforest and into tiny villages that are home to an ever-increasing offering of galleries, cafés and restaurants.

There are towns here that only the local postie knows about; eute hamlets that could have been lifted out of fairy tales, hidden mostly behind blooming >>



Travel: the best places to visit in Australia in 2018

January 22, 2018



Kakadu is one of the world's greatest national parks, with climbs, views, plunge pools and gorges to satisfy your Instagram for months. **Supplied** by **Caroline Berdon**

It makes sense to spend your holiday dollar at home when we have such incredible diversity.

Here are some of recommended hotspots to visit in 2018.

The Tweed - NSW

Why: This northern NSW coast region offers World Heritage rainforests, mountain ranges, uncrowded beaches and world-famous surf breaks - all nestled in the eroded caldera of the largest shield volcano in the southern hemisphere. Outside the main centres of Kingscliff, Tweed Heads and Murwillumbah, you can enjoy the quirky charm of quiet villages and historic river ports. The Tweed also offers easy access to the Gold Coast

Destination Research: Data Monitoring & Analysis

Digital Statistics

The following data provides an overview of the traffic to the website over the quarter, with an average of 80% traffic as new visitors to the site and 20% returning

January – March 2018 Overview

Sessions – 18,720

New Visitors – 15,134 (80.8%)

Returning Visitors – 3,586 (19.02%)

January 2018

Sessions – 7,558

New Visitors – 6,072 (80%)

Returning Visitors – 1,486 (20%)

February 2018

Sessions – 5,166

New Visitors – 4,191 (81%)

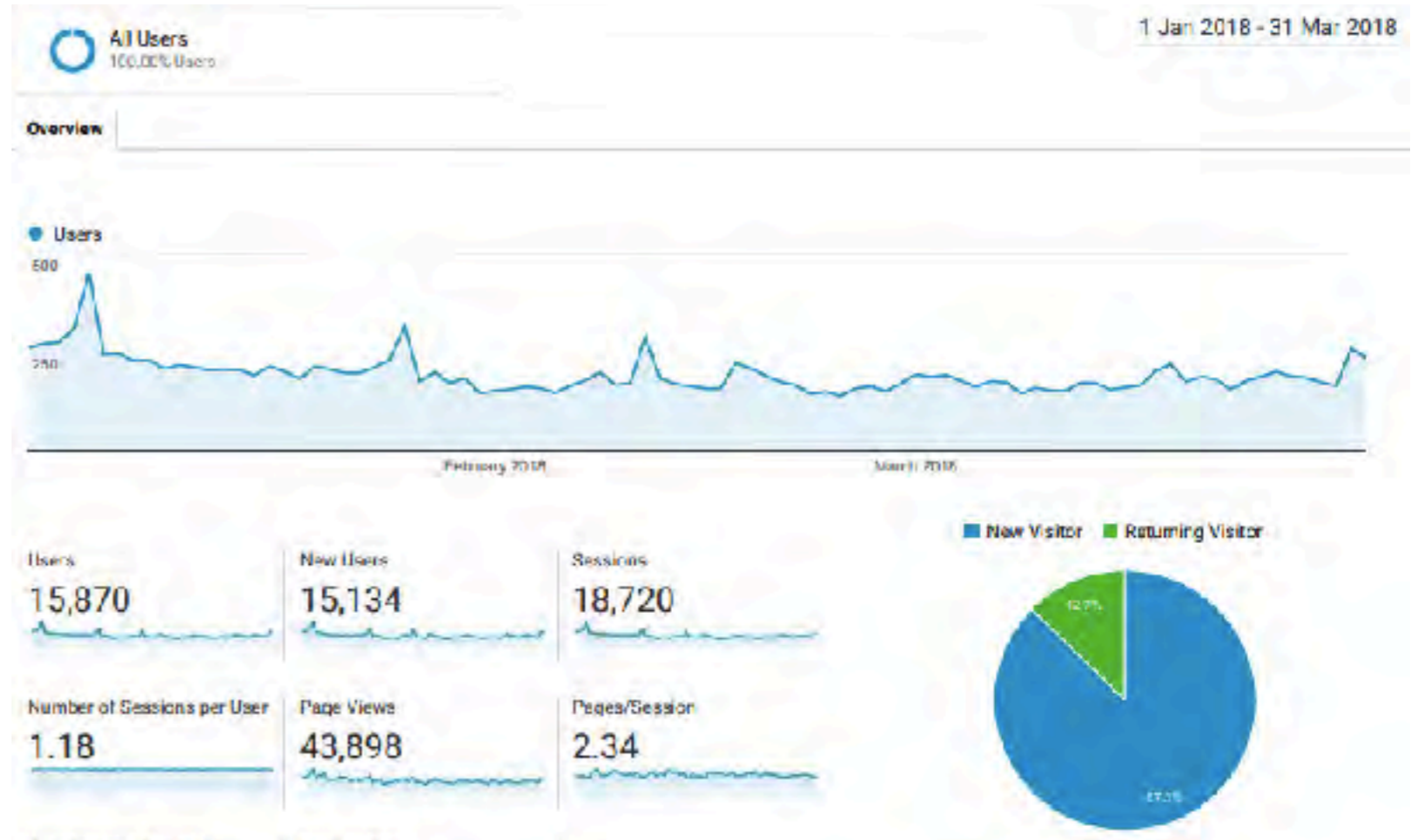
Returning Visitors – 975 (19%)

March 2018

Sessions – 5,996

New Visitors – 4,871 (81%)

Returning Visitors – 1,125 (19%)



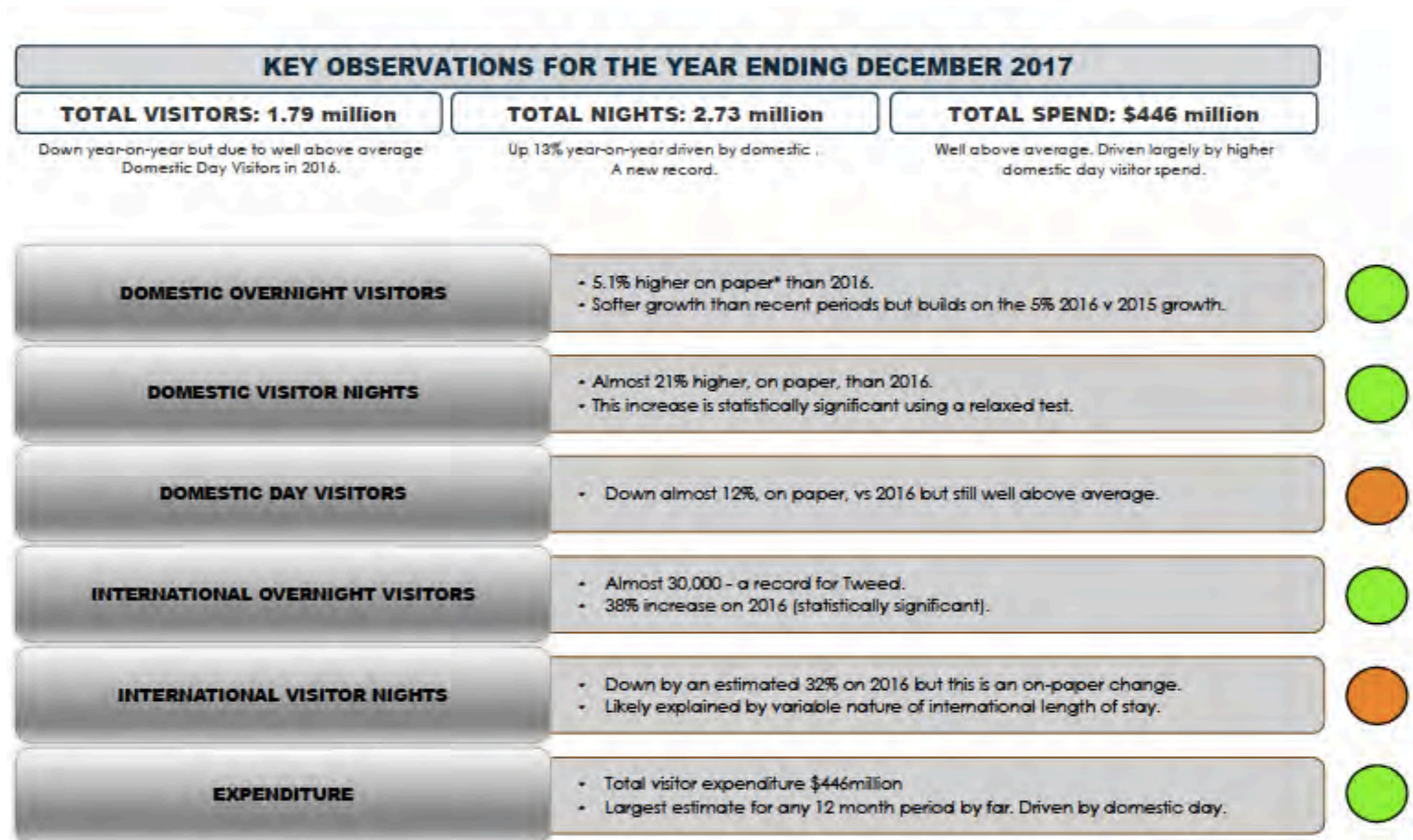
Visitor Information Centre Statistics

Location	March 2017 Quarter	March 2018 Quarter	Down	Contributing Factors
Murwillumbah	4147	2940	-29%	No Bus Groups
Tweed	5549	4748	-14%	Hot Summer
Kingscliff	2626	1822	-30%	Redevelopment of park
Total Visitors	12322	9510	-23%	

Destination Performance - Visitation Data - “The Tweed 2017 Visitor Economy Hits Record Heights”

2017 was the best year on record, with the total visitor spend reaching \$446 million compared to the average over the past five years of \$377 million. The reason for this is an increase in the average expenditure of domestic day visitors, increase from \$68 per person to \$108 per visit

The longer term average is \$90, so we can now assume the recent two periods which averaged \$68.5 per visitor, were below average . Rather than the \$108 appearing abnormal, it suggests that the decline experienced in the past 2 years, in average day visitor spend has been reversed.



Key Visitor Insights for Year Ending December 2017

- ✓ The domestic overnight visitor estimate of 643,000 represents the 5th consecutive estimate above 600,000 and the first time on record that there have been more than 600,000 domestic overnight visitors in a calendar year
- ✓ This is an 'on-paper' increase of 5.1 % on calendar 2016. The change is not statistically significant and should not be considered and reported with this in mind
- ✓ Domestic Overnight visitor volume in the former Northern Rivers Region was virtually very similar to 2016. Ignoring sample error, Tweed's volume was therefore 5.2% better than the Northern Rivers Region
- ✓ Tweed's market share remains close to 25%. The difference between 2017 and 2016 is not considered significant
- ✓ Benchmark the Tweed's 2017 2 year rolling average trendline is clearly positive and as with recent periods the latest results are above the trend
- ✓ 2017 has been an interesting year for the NSW market. Whilst the State 'bottom line' is positive several destinations have experienced a decline in visitor volume
- ✓ **Domestic overnight visitors** spent an estimated 2.52 million nights in the Tweed Local Government Area in the year ending December 2017. Average length of stay in the period was therefore 3.9 nights (vs 3.4 for year ending December 2016)
- ✓ This is an on-paper increase of 11.2% on the year ending September 2016 (caution: the change is only statistically significant when a relaxed test is used)
- ✓ Tweed continued to perform better than the former Northern Rivers Region. Nights in the former region were down 2.8% on 2016
- ✓ Tweed's market share of the Northern Rivers Region was 5 percentage points higher than in 2016 (not considering sample error) and - and shows signs of edging up
- ✓ In summary - the latest estimate is positive on all measures. It is also well above the broader market average
- ✓ **Domestic day visitors** followed a trajectory similar to recent periods
- ✓ The total for 2017 of 1.11 million is almost 12% lower than 2016. Whilst the change is not statistically significant it was the second consecutive year-on-year drop
- ✓ In contrast to the Tweed, domestic day visitor volume in the former Northern Rivers Region higher in 2017 than it was in 2016 with a year-on-year growth rate of 4.2%
- ✓ Tweed's market share of the former Northern Rivers Region was 27.5% - five percentage points lower than 2016
- ✓ The 2 year rolling average trendline has turned negative with the addition of the latest data
- ✓ Whilst 'trip-type-swapping' by visitors living within easy driving distance of the Tweed (i.e. overnight visit instead of a day visit) may be partly responsible for the latest downward movements in day visitors this cannot be certain
- ✓ An estimated 29,200 international visitors spent at least one night in the Tweed Local Government Area in the year ending December 2017.
- ✓ This is the highest on record and a STATISTICALLY SIGNIFICANT increase of 10% on calendar 2016.
- ✓ In contrast to the Tweed, international overnight visitor volume in the former Northern Rivers Region was virtually identical to 2016.
- ✓ Tweed's market share of the Region was up 3 percentage points on 2016 and returns to the above average zone.
- ✓ In summary - the latest estimate represents a return to the growth trend that appeared to be interrupted in the year ending September 2017.
- ✓ An examination of the origin of visitor breakdown suggests that the Tweed's traditional international markets are driving the growth. This is particularly true of New Zealand, followed by the United Kingdom and the United States.

Summary prepared by Tourism Solutions from TRA NVS and IVS data sets YE December 2017