



Tweed Tourism Monitor

Monitoring Tweed Local Government Area Tourism Volume and Market Share

YEAR ENDING DECEMBER 2017

An Independent Report Prepared for Destination Tweed by Peter Valerio;
Principal, Tourism Strategy Development Services

KEY OBSERVATIONS FOR THE YEAR ENDING DECEMBER 2017

TOTAL VISITORS: 1.79 million

Down year-on-year but due to well above average Domestic Day Visitors in 2016.

TOTAL NIGHTS: 2.73 million

Up 13% year-on-year driven by domestic . A new record.

TOTAL SPEND: \$446 million

Well above average. Driven largely by higher domestic day visitor spend.

DOMESTIC OVERNIGHT VISITORS

- 5.1% higher on paper* than 2016.
- Softer growth than recent periods but builds on the 5% 2016 v 2015 growth.



DOMESTIC VISITOR NIGHTS

- Almost 21% higher, on paper, than 2016.
- This increase is statistically significant using a relaxed test.



DOMESTIC DAY VISITORS

- Down almost 12%, on paper, vs 2016 but still well above average.



INTERNATIONAL OVERNIGHT VISITORS

- Almost 30,000 - a record for Tweed.
- 38% increase on 2016 (statistically significant).



INTERNATIONAL VISITOR NIGHTS

- Down by an estimated 32% on 2016 but this is an on-paper change.
- Likely explained by variable nature of international length of stay.



EXPENDITURE

- Total visitor expenditure \$446million
- Largest estimate for any 12 month period by far. Driven by domestic day.



*On paper means that the change is not statistically significant

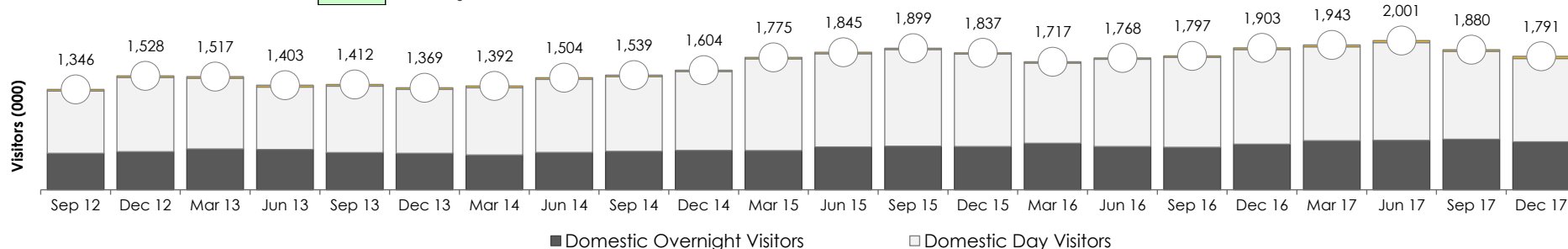
Tweed Tourism Monitor

SUMMARY FOR YEAR ENDING DECEMBER 2017

TOTAL VISITOR ESTIMATES (000)

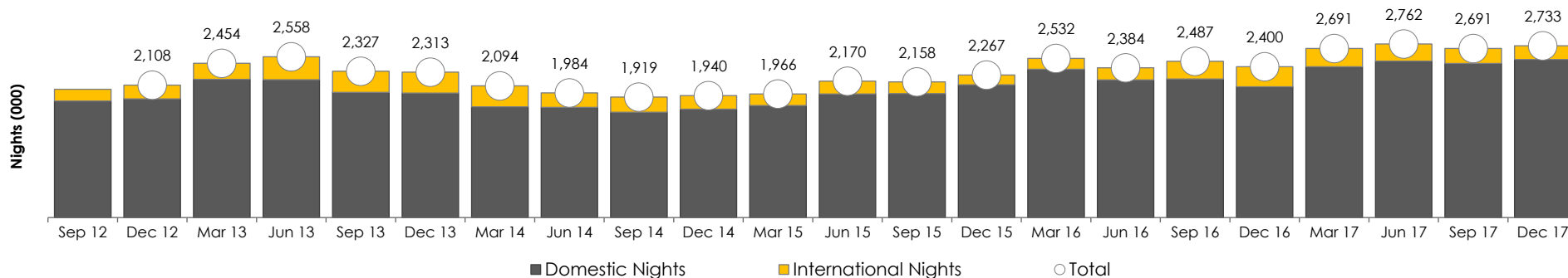
Year ending >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Domestic Overnight Visitors	490	511	548	540	500	490	466	502	516	528	526	575	585	580	623	579	571	612	658	663	678	643
Domestic Day Visitors	834	996	948	839	890	857	903	980	1,002	1,058	1,231	1,251	1,296	1,239	1,076	1,172	1,204	1,270	1,261	1,311	1,178	1,119
International Overnight Visitors	22	21	21	24	22	22	23	22	21	18	18	19	18	18	18	17	22	21	24	27	24	29
TOTAL VISITORS	1,346	1,528	1,517	1,403	1,412	1,369	1,392	1,504	1,539	1,604	1,775	1,845	1,899	1,837	1,717	1,768	1,797	1,903	1,943	2,001	1,880	1,791
% change vs same period prev. year**	-6%	2%	10%	0%	5%	-10%	-8%	7%	9%	17%	28%	23%	23%	15%	-3%	-4%	-5%	4%	13%	13%	5%	-6%

 Above average estimate



TOTAL VISITOR NIGHTS

	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Domestic Nights	1,854	1,888	2,198	2,194	1,993	1,981	1,761	1,753	1,676	1,726	1,783	1,966	1,971	2,113	2,361	2,191	2,205	2,081	2,400	2,490	2,452	2,516
International Nights	186	220	256	364	334	332	333	231	243	214	183	204	187	154	171	193	282	319	291	272	239	217
TOTAL NIGHTS	2,040	2,108	2,454	2,558	2,327	2,313	2,094	1,984	1,919	1,940	1,966	2,170	2,158	2,267	2,532	2,384	2,487	2,400	2,691	2,762	2,691	2,733
% change vs same period prev. year**	7%	4%	36%	54%	14%	10%	-15%	-22%	-18%	-16%	-6%	9%	12%	17%	29%	10%	15%	6%	6%	16%	8%	14%



Source data: Unpublished data extracted from Tourism Research Australia; National & International Visitor Surveys (2011-2017).

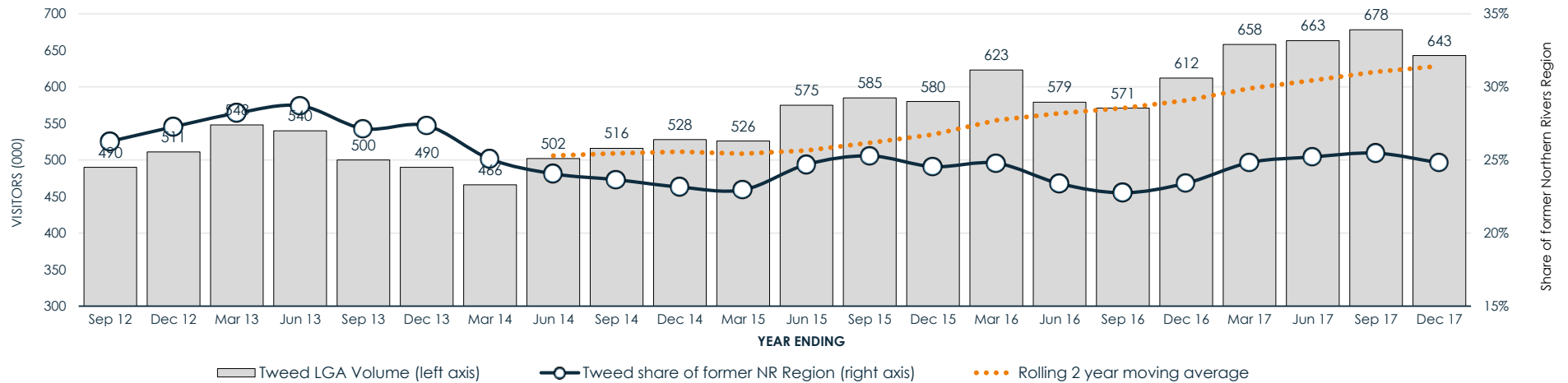
TWEED TOURISM MONITOR

Year ending December 2017

Domestic Overnight Visitors

YEAR ENDING >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Tweed LGA (000)	490	511	548	540	500	490	466	502	516	528	526	575	585	580	623	579	571	612	658	663	678	643
% change vs same period previous year*	-10.9%	-11.6%	10.3%	21.9%	2.0%	-4.1%	-15.0%	-7.0%	3.2%	7.8%	12.9%	14.5%	13.4%	9.8%	18.4%	0.7%	-2.4%	5.5%	5.6%	14.6%	18.8%	5.1%
Northern Rivers Tourism Region (000)	1,865	1,874	1,943	1,881	1,842	1,792	1,859	2,087	2,182	2,281	2,291	2,329	2,314	2,363	2,514	2,476	2,509	2,614	2,651	2,631	2,663	2,592
% change vs same period previous year	-9.0%	-7.5%	1.1%	5.6%	-1.2%	-4.4%	-4.3%	11.0%	18.5%	27.3%	23.2%	11.6%	6.0%	3.6%	9.7%	6.3%	8.4%	10.6%	5.4%	6.3%	6.1%	-0.8%
% share of Northern Rivers Tourism Region	26.3%	27.3%	28.2%	28.7%	27.1%	27.3%	25.1%	24.1%	23.6%	23.1%	23.0%	24.7%	25.3%	24.5%	24.8%	23.4%	22.8%	23.4%	24.8%	25.2%	25.5%	24.8%

SHADING LEGEND: Above average estimate * Refer key points for statistical significance of the change



Source data: Unpublished data extracted from Tourism Research Australia; National Visitor Surveys (2011-2017).

Note: Data is subject to sample survey error.

KEY POINTS 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 The 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.

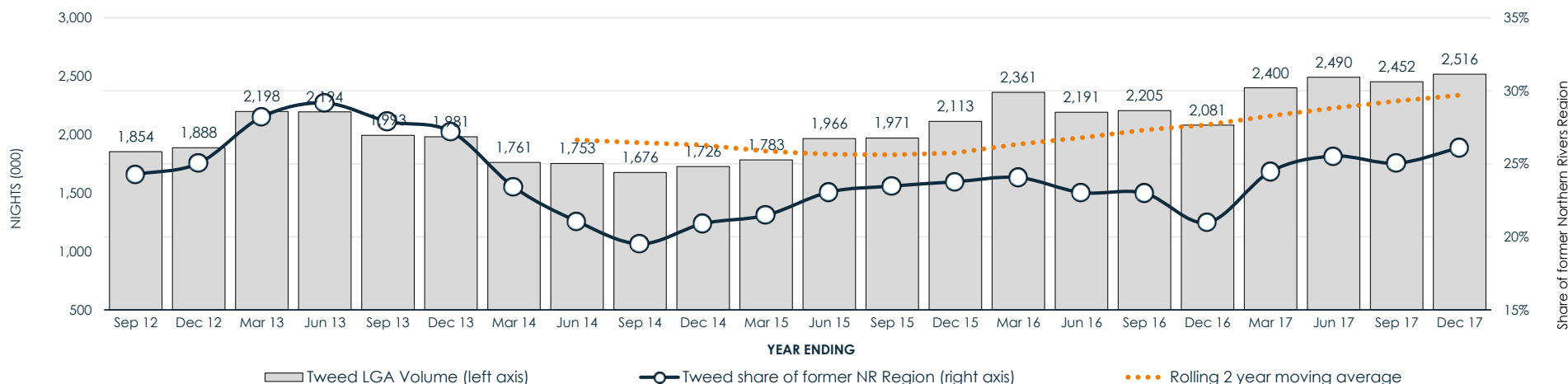
TWEED TOURISM MONITOR

Year ending December 2017

Domestic Visitor Nights

YEAR ENDING >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Tweed LGA	1,854	1,888	2,198	2,194	1,993	1,981	1,761	1,753	1,676	1,726	1,783	1,966	1,971	2,113	2,361	2,191	2,205	2,081	2,400	2,490	2,452	2,516
% change vs same period previous year	10.4%	4.7%	36.6%	48.6%	7.5%	4.9%	-19.9%	-20.1%	-15.9%	-12.9%	1.2%	12.2%	17.6%	22.4%	32.4%	11.4%	11.9%	-1.5%	1.7%	13.6%	11.2%	20.9%
Northern Rivers Tourism Region	7,638	7,539	7,793	7,524	7,145	7,282	7,526	8,325	8,585	8,258	8,301	8,524	8,396	8,890	9,815	9,514	9,593	9,917	9,809	9,754	9,793	9,638
% change vs same period previous year	2.7%	-2.7%	5.3%	9.5%	-6.5%	-3.4%	-3.4%	10.6%	20.2%	13.4%	10.3%	2.4%	-2.2%	7.7%	18.2%	11.6%	14.3%	11.6%	-0.1%	2.5%	2.1%	-2.8%
% share of Northern Rivers Tourism Region	24.3%	25.0%	28.2%	29.2%	27.9%	27.2%	23.4%	21.1%	19.5%	20.9%	21.5%	23.1%	23.5%	23.8%	24.1%	23.0%	23.0%	21.0%	24.5%	25.5%	25.0%	26.1%

SHADING LEGEND: Above average estimate for Tweed



Source data: Unpublished data extracted from Tourism Research Australia; National Visitor Survey (2011-2017).

Note: Data is subject to sample survey error.

KEY POINTS FOR YEAR ENDING DECEMBER 2017

- 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.

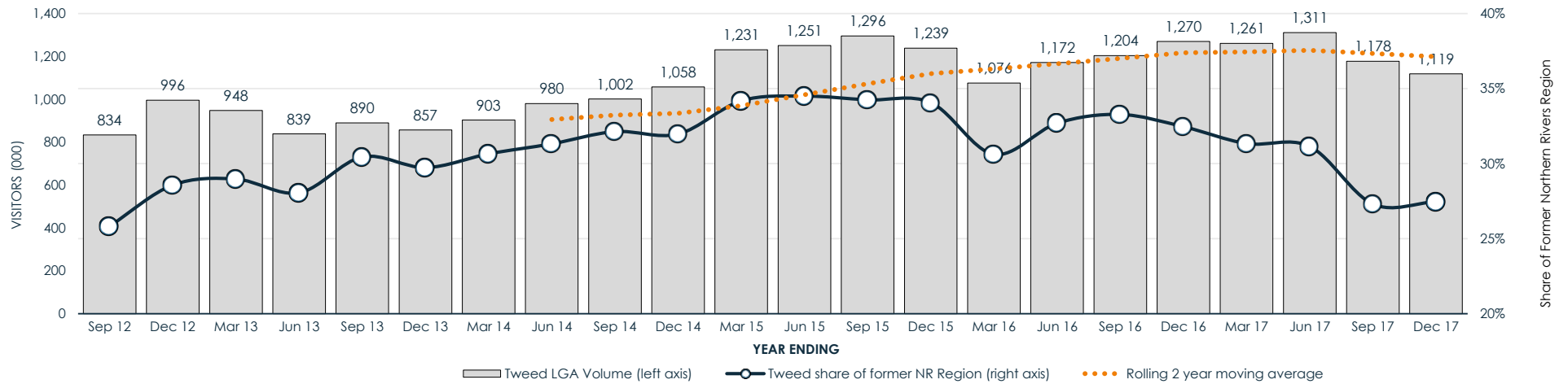
TWEED TOURISM MONITOR

Year ending December 2017

Domestic Day Visitors

YEAR ENDING >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Tweed LGA	834	996	948	839	890	857	903	980	1,002	1,058	1,231	1,251	1,296	1,239	1,076	1,172	1,204	1,270	1,261	1,311	1,178	1,119
% change vs same period previous year	-3.7%	11.0%	10.1%	-10.7%	6.7%	-14.0%	-4.7%	16.8%	12.6%	23.5%	36.3%	27.7%	29.3%	17.1%	-12.6%	-6.3%	-7.1%	2.5%	17.2%	11.9%	-2.2%	-11.9%
Northern Rivers Tourism Region	3,228	3,486	3,272	2,990	2,923	2,882	2,946	3,129	3,118	3,309	3,601	3,626	3,784	3,637	3,514	3,585	3,618	3,912	4,024	4,211	4,313	4,075
% change vs same period previous year	-9.3%	-1.6%	-4.3%	-9.5%	-9.4%	-17.3%	-10.0%	4.6%	6.7%	14.8%	22.2%	15.9%	21.4%	9.9%	-2.4%	-1.1%	-4.4%	7.6%	14.5%	17.5%	19.2%	4.2%
% share of Northern Rivers Tourism Region	25.8%	28.6%	29.0%	28.1%	30.4%	29.7%	30.7%	31.3%	32.1%	32.0%	34.2%	34.5%	34.2%	34.1%	30.6%	32.7%	33.3%	32.5%	31.3%	31.1%	27.3%	27.5%

SHADING LEGEND: Above average Tweed estimate



Source data: Unpublished data extracted from Tourism Research Australia; National Visitor Survey (2011-2017).

Note: Data is subject to sample survey error.

KEY POINTS FOR YEAR ENDING DECEMBER 2017

- 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.

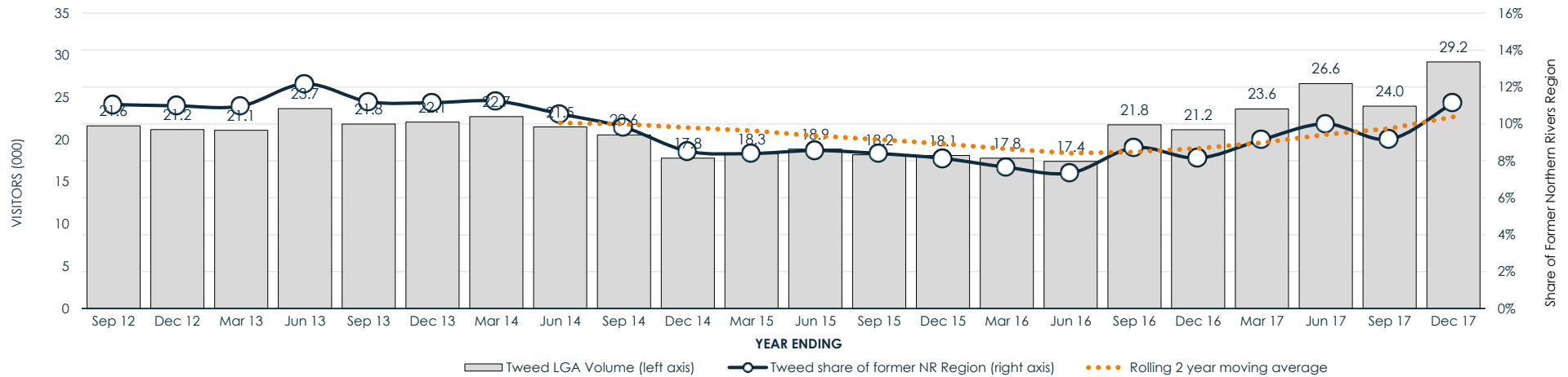
TWEED TOURISM MONITOR

Year ending December 2017

International Overnight Visitors

YEAR ENDING >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Tweed LGA (000)	21.6	21.2	21.1	23.7	21.8	22.1	22.7	21.5	20.6	17.8	18.3	18.9	18.2	18.1	17.8	17.4	21.8	21.2	23.6	26.6	24.0	29.2
% change vs same period previous year	-4.6%	-7.2%	4.9%	21.7%	1.0%	4.2%	7.7%	-9.1%	-5.8%	-19.4%	-19.4%	-12.3%	-11.5%	1.8%	-2.8%	-7.6%	19.5%	16.8%	32.7%	52.8%	10.1%	38.0%
Northern Rivers Tourism Region (000)	196	193	193	195	195	198	203	204	210	209	218	221	217	223	233	238	250	260	259	266	261	262
% change vs same period previous year	-1.3%	-0.5%	-1.4%	3.1%	-0.4%	2.6%	5.2%	4.9%	7.4%	5.4%	7.8%	8.1%	3.6%	6.7%	6.7%	7.7%	15.1%	16.5%	11.0%	12.1%	4.6%	1.0%
% share of Northern Rivers Tourism Region	11.0%	11.0%	11.0%	12.2%	11.2%	11.1%	11.2%	10.5%	9.8%	8.5%	8.4%	8.6%	8.4%	8.1%	7.6%	7.3%	8.7%	8.1%	9.1%	10.0%	9.2%	11.1%

SHADING LEGEND: Above average estimate



Source data: Unpublished data extracted from Tourism Research Australia; International Visitor Survey (2011-2017).

Note: Data is subject to sample survey error.

KEY POINTS FOR YEAR ENDING DECEMBER 2017

- 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.

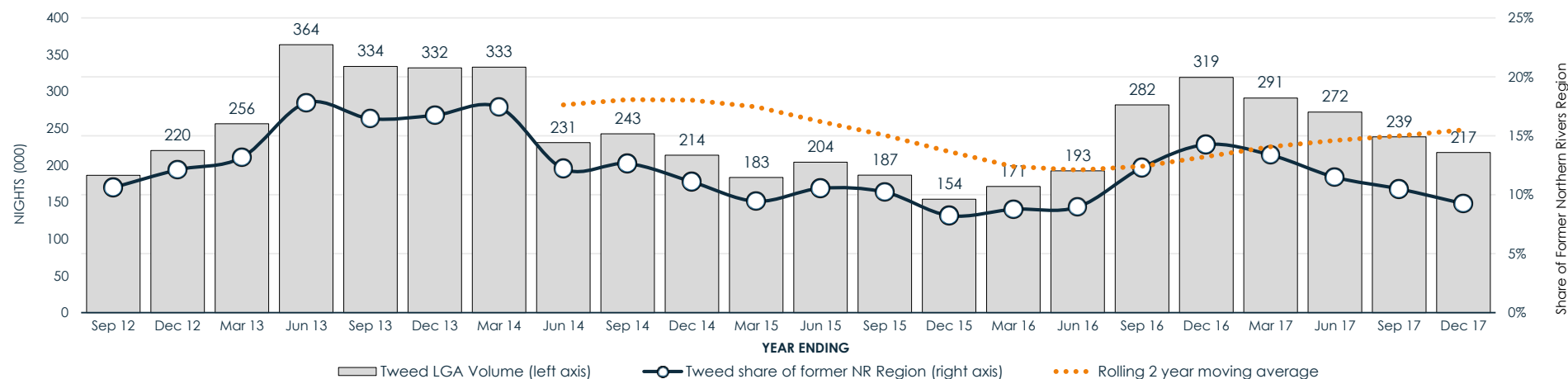
TWEED TOURISM MONITOR

Year ending December 2017

International Nights

Year ending >	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17
Tweed LGA (000)	186	220	256	364	334	332	333	231	243	214	183	204	187	154	171	193	282	319	291	272	239	217
% change vs same period previous year	-16.7%	-5.1%	28.3%	93.3%	79.3%	50.9%	30.0%	-36.6%	-27.3%	-35.7%	-44.9%	-11.5%	-23.1%	-27.9%	-6.7%	-5.7%	51.0%	107.4%	70.2%	41.4%	-15.4%	-32.0%
Northern Rivers Tourism Region (000)	1,756	1,817	1,947	2,044	2,031	1,984	1,912	1,890	1,920	1,925	1,942	1,936	1,827	1,870	1,952	2,148	2,293	2,239	2,179	2,370	2,273	2,351
% change vs same period previous year	2.5%	9.1%	14.4%	28.3%	15.7%	9.2%	-1.8%	-7.5%	-5.5%	-3.0%	1.6%	2.5%	-4.9%	-2.9%	0.5%	10.9%	25.5%	19.8%	11.6%	10.3%	-0.9%	5.0%
% share of Northern Rivers Tourism Region	10.6%	12.1%	13.2%	17.8%	16.5%	16.7%	17.4%	12.2%	12.6%	11.1%	9.4%	10.5%	10.2%	8.2%	8.8%	9.0%	12.3%	14.3%	13.4%	11.5%	10.5%	9.2%

SHADING LEGEND: Above average estimate



Source data: Unpublished data extracted from Tourism Research Australia; International Visitor Survey (2011-2017).

Note: Data is subject to sample survey error.

KEY POINTS FOR YEAR ENDING DECEMBER 2017

- International visitors spend an estimated 217,000 nights in the Tweed in the year ending December 2017.
- This represents an on-paper decline of 32.5% compared to the year end December 2016 but the sample error associated with the 2017 and 2016 estimates means that it is NOT a statistically significant change. Unlike domestic tourism, international trip lengths can vary dramatically. This may also explain the change. In this respect a decline is not necessarily a negative thing.
- That point noted, Tweed's market share of the Northern Rivers Region also dropped by around five percentage points compared to the same period in 2016.
- It is difficult to determine the markets responsible for the downwards shift accurately. However, in this case it does appear that markets others than Tweed's main markets are the likely cause and is more a reflection of well above nights volume associated with the 'Other Countries' category in 2016 as opposed to a decline in 2017.

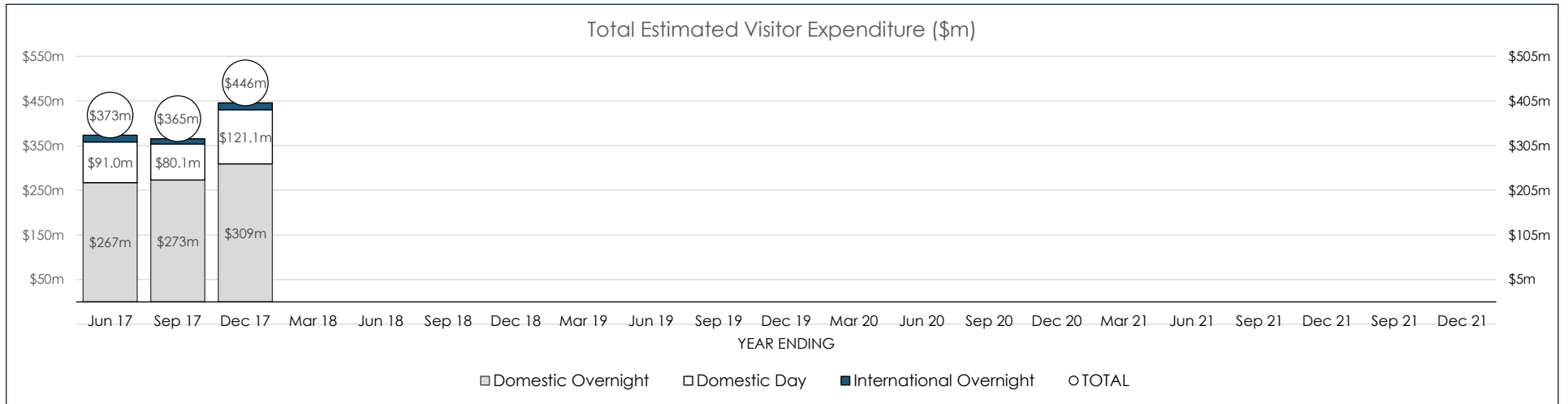
TWEED TOURISM MONITOR

Year ending December 2017

VISITOR EXPENDITURE APPENDIX

IMPORTANT NOTE & CONDITION OF SUPPLY:

The estimation of visitor expenditure is amongst one of the most challenging tourism research endeavours. In Australia, estimates of expenditure data are collected in the National and International Visitor Surveys. These estimates are collected at an overall trip level; not for specific destinations. Estimates for specific destinations are estimated using Tourism Research Australia's visitor expenditure allocation model. Despite these limitations, they are the best available estimates of visitor expenditure for Local Government Areas. Expenditure estimates and changes in expenditures should therefore be interpreted, and described, as indicative. These limitations must be acknowledged and conveyed in all related reporting.



YEAR ENDING

TOTAL EXPENDITURE	Jun 17	Sep 17	Dec 17
Domestic Overnight Visitors	\$267.3m	\$273.2m	\$309.3m
Domestic Day Visitors	\$91.0m	\$80.1m	\$121.1m
International Overnight Visitors	\$15.0m	\$12.1m	\$15.4m
TOTAL \$	\$373m	\$365m	\$446m

\$ PER VISIT	Jun 17	Sep 17	Dec 17
Domestic Overnight Visitors	\$403	\$403	\$481
Domestic Day Visitors	\$69	\$68	\$108
International Overnight Visitors	\$562	\$503	\$526

\$ PER NIGHT	Jun 17	Sep 17	Dec 17
Domestic Overnight Visitors	\$107	\$111	\$123
International Overnight Visitors	\$55	\$51	\$71

Sources: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets in conjunction with TRA; Visitor Expenditure Allocation Methodology (both unpublished)