



Tweed Tourism Monitor

Monitoring Tweed Local Government Area Tourism Volume and Market Share

YEAR ENDING SEPTEMBER 2017

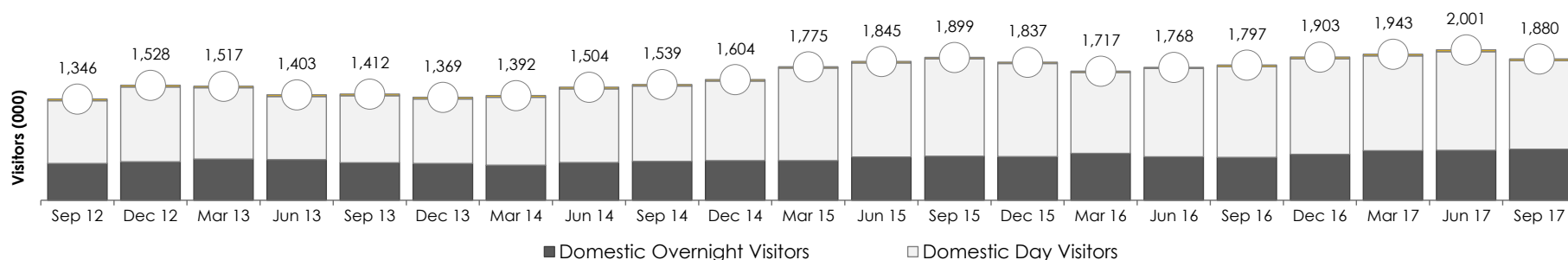
An Independent Report Prepared for Destination Tweed by Peter Valerio;
Principal, Tourism Strategy Development Services

Tweed Tourism Monitor

SUMMARY FOR YEAR ENDING SEPTEMBER 2017

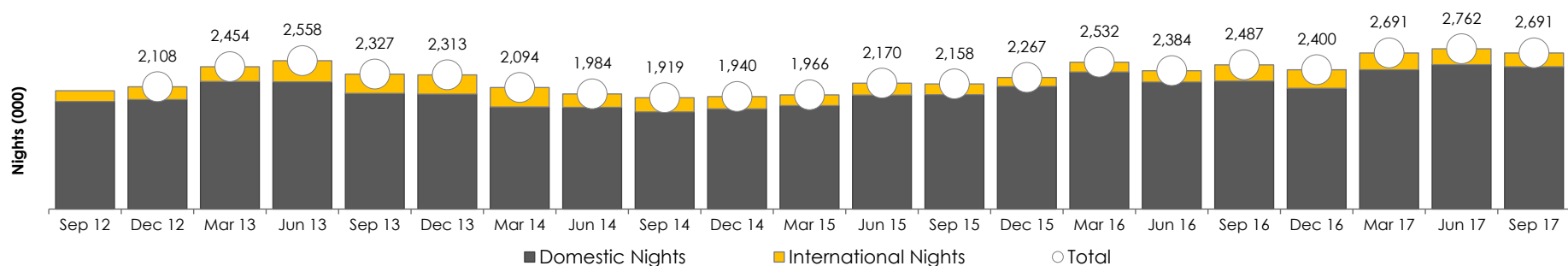
TOTAL VISITOR ESTIMATES (000)

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
Domestic Overnight Visitors	490	511	548	540	500	490	466	502	516	528	526	575	585	580	623	579	571	612	658	663	678
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
International Overnight Visitors	22	21	21	24	22	22	23	22	21	18	18	19	18	18	18	17	22	21	24	27	24
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
% 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%



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
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
International Nights	186	220	256	364	334	332	333	231	243	214	183	204	187	154	171	193	282	319	291	272	239
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
% 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%



Source data: Unpublished data extracted from Tourism Research Australia; National & International Visitor Surveys (2011-2017).

TWEED TOURISM MONITOR

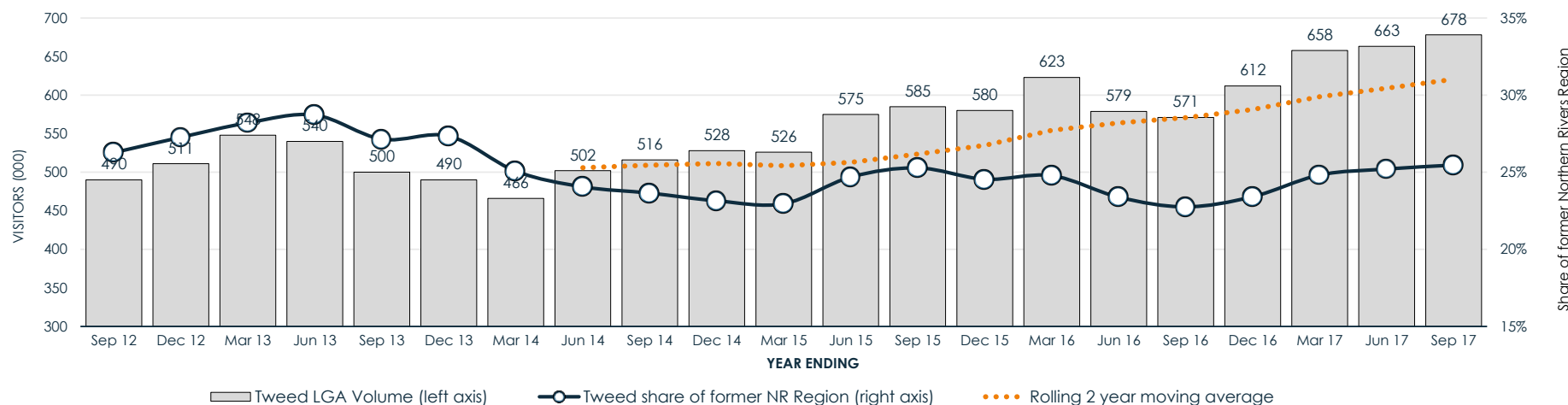
Year ending September 2017

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
Tweed LGA (000)	490	511	548	540	500	490	466	502	516	528	526	575	585	580	623	579	571	612	658	663	678
% 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%
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
% 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%
% 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%

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 SEPTEMBER 2017

- The domestic overnight visitor estimate of 678,000 is well above average and the highest estimate for any 12 month period on record.
- This is an increase of 18.8% on the year ending September 2016 - a statistically significant change using a 90% confidence interval.
- Domestic Overnight visitor volume in the former Northern Rivers Region was also higher in the latest period although the percentage change was only one-third that of the Tweed.
- Tweed's market share of the former Northern Rivers Region was almost three percentage points higher than the year ending September 2016 (not considering sample error) and extends a period of recent share stability.
- The 2 year rolling average trendline is clearly positive and as with recent periods the latest results are above the trend.
- In summary - the latest estimate represents a continuation of positive trend that suggests overnight tourism has reached a new level.

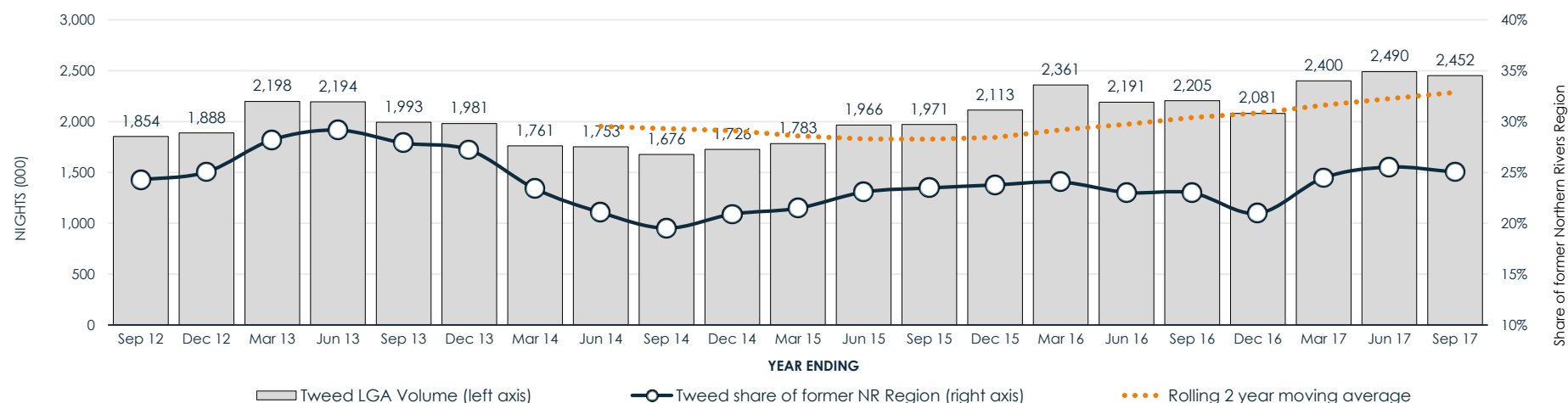
TWEED TOURISM MONITOR

Year ending September 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
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
% 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%
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
% 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%
% 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%

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 SEPTEMBER 2017

- Domestic overnight visitors spent an estimated 2.45 million nights in the Tweed Local Government Area in the year ending September 2017. Average length of stay in the period was therefore 3.6 nights (vs 3.9 for year ending September 2016).
- This is an on-paper increase of 11.2% on the year ending September 2016 (caution: the change is not statistically significant).
- Tweed continued to perform better than the former Northern Rivers Region. Nights in the former region were very similar to the year ending September 2016.
- Tweed's market share of the Northern Rivers Region was two percentage points higher than the year ending September 2016 (not considering sample error) and - as with overnight visitor share - extends a period of recent share stability.
- In summary - the latest estimate represents a continuation of positive trend that is very similar to the trend in visitor numbers. However, there has been very little change in volume since the year ending March 2017. This run of three similar volumes may represent a slowdown in growth.

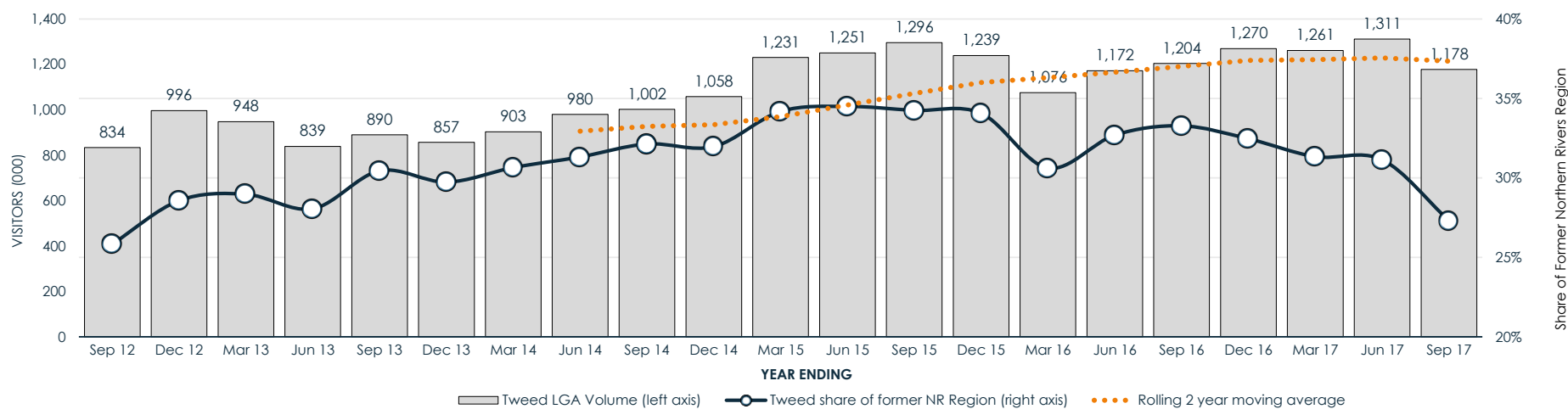
TWEED TOURISM MONITOR

Year ending September 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
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
% 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%
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
% 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%
% 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%

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 SEPTEMBER 2017

- After three consecutive periods of growth domestic day visitors returned to a level very similar to the year ending September 2016.
- The total for the latest period of 1.19 million represents a small on paper decline of 2.2%. This change is not statistically significant.
- In contrast, domestic day visitor volume in the former Northern Rivers Region was significantly higher than it was in year ending September 2016 with a year-on-year growth rate of almost 20%.
- The net effect of the variation in growth is that Tweed's market share of the former Northern Rivers Region was six percentage points lower than the same period in 2016. The 27.3% share was one of the lowest in the Monitor.
- The 2 year rolling average trendline has flattened out and shows signs of angling down.
- In summary - when viewed in conjunction with an increase in domestic overnight visitation, the latest estimate may represent 'trip-type-swapping' by visitors living within easy driving distance of the Tweed. In other words, a portion of day visitors may have chosen to visit overnight.

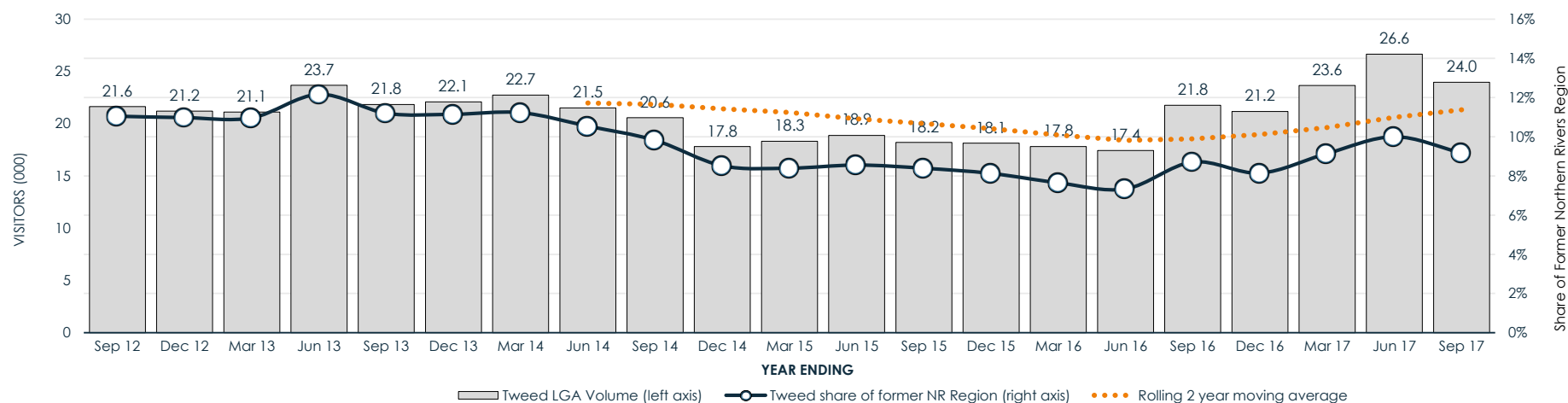
TWEED TOURISM MONITOR

Year ending September 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
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
% 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%
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
% 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%
% 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%

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 SEPTEMBER 2017

- An estimated 24,000 international visitors spent at least one night in the Tweed Local Government Area in the year ending September 2017.
- This is an up paper increase of just over 10% on the year ending September 2016 - a change that is not considered statistically significant.
- International overnight visitor volume in the former Northern Rivers Region was also higher in the latest period although the year-on-year percentage change was half that of the Tweed.
- Tweed's market share was up marginally on the year ending September 2016 but slightly lower than the previous period. These changes are not significant.
- The 2 year rolling average trendline remains positive despite what may be signs of a softening Regional market.
- In summary - the latest estimate represents a slight deviation from the recent growth trend and market share. It is not possible to determine whether this is a minor interruption or a more significant change. The year ending December 2017 Monitor will help determine this.

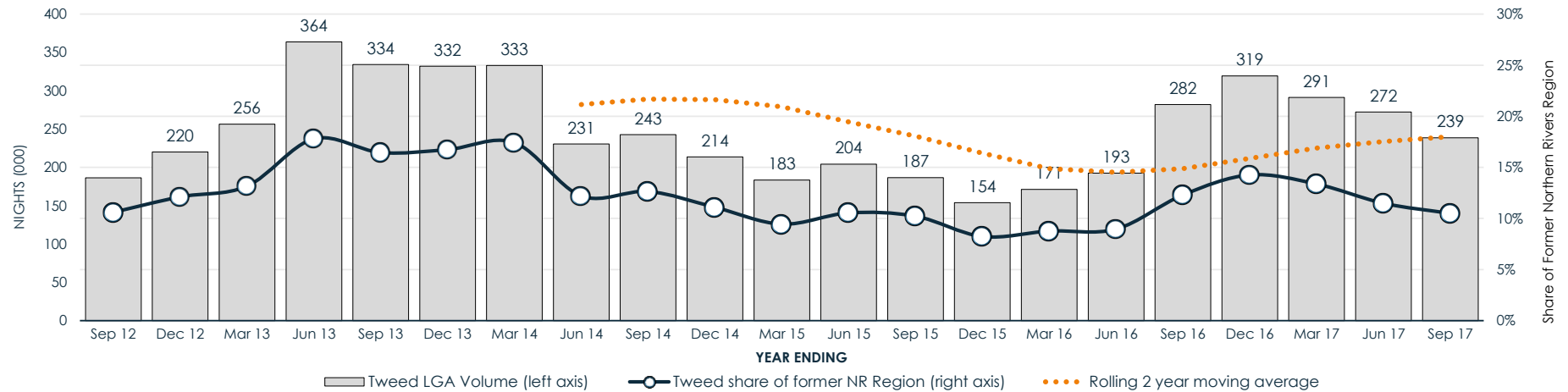
TWEED TOURISM MONITOR

Year ending September 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
Tweed LGA (000)	186	220	256	364	334	332	333	231	243	214	183	204	187	154	171	193	282	319	291	272	239
% 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%
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
% 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%
% 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%

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 SEPTEMBER 2017

- International visitors spend an estimated 239,000 nights in the Tweed in the year ending September 2017.
- This was just over 15% lower than the year end September 2016 volume and although this change was not statistically significant the fact that it was the third consecutive decrease suggests that a negative change occurred.
- International visitor nights volume in the former Northern Rivers Region was also lower than in year end September 2016 but the percentage change was less than 1%. Perhaps more significantly is the fact that the negative change is the first since the year ending December 2015.
- Tweed's market share of the Northern Rivers Region was dropped to 10.5% - the second consecutive lower than average share result.
- The moving average trendline continues towards a flatter trajectory.
- In summary - recent results may be following a cycle or the result of point in time factors. Irrespective, the downwards trend should be monitored closely.

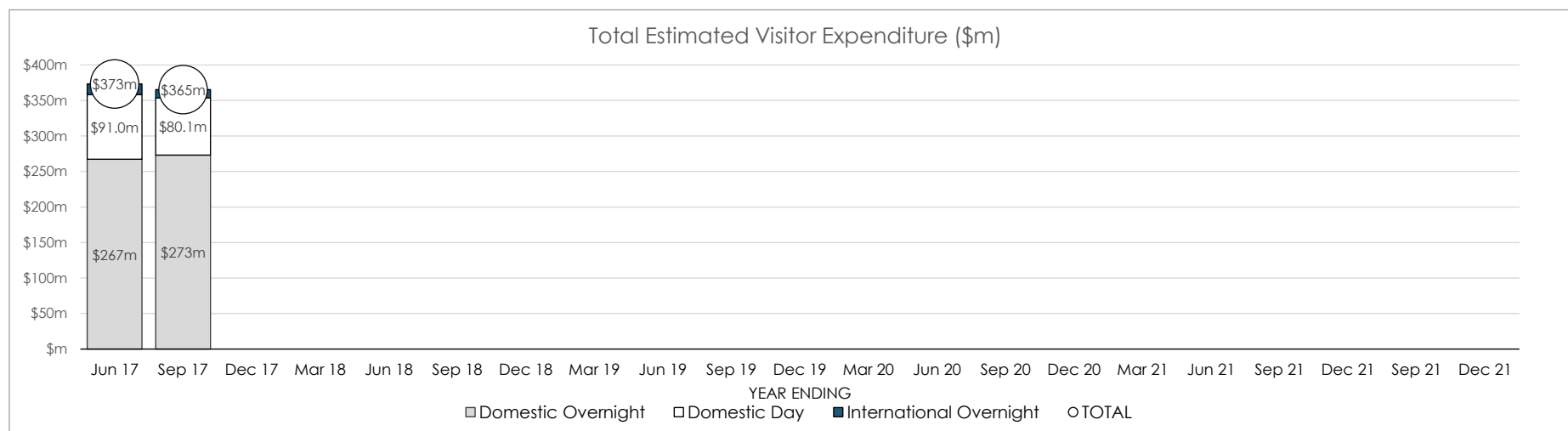
TWEED TOURISM MONITOR

Year ending September 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

Domestic Overnight Visitors	\$267.3m	\$273.2m
Domestic Day Visitors	\$91.0m	\$80.1m
International Overnight Visitors	\$15.0m	\$12.1m
TOTAL \$	\$373m	\$365m

\$ PER VISIT Jun 17 Sep 17

Domestic Overnight Visitors	\$403	\$403
Domestic Day Visitors	\$69	\$68
International Overnight Visitors	\$562	\$503

\$ PER NIGHT Jun 17 Sep 17

Domestic Overnight Visitors	\$107	\$111
International Overnight Visitors	\$55	\$51

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