



LOCAL AREA TOURISM RESEARCH PROFILES - FUTURE DIRECTIONS

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INTRODUCTION

- The Council of Tourist Associations (CTA) operating since 1964
- CTA represents 60 Local Tourist Associations throughout NSW
- CTA's role - the voice of local area tourism in NSW
- Local area tourism invests \$36,000,000 across NSW annually
- Personal research expertise - score zero




THE CHALLENGE

- Problem since the mid 90's
- 2003 Tourism NSW (top line) LGA Estimates
- CTA research working group of Senior Local Government Area Tourism Managers



THE CHALLENGE (Cont.)

- Gradual development of the concept of deep data mining of the NVS
- Eventual emergence of the concept of “Below the Line” Local Area Profiles at the LGA Level
- CTA risks investment of the bulk of member reserves



NATIONAL VISITORS SURVEY

- Highest quality research product
- WTO recognition
- Increase in survey from 80,000 to 120,000
- World's Best Practice

Domestic Nights Profile for Port Stephens(A)LGA

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Home Region (NSW/VIC/QLD regions only)	Sydney	1,190	2003	33
	Hunter	409	2002-03	39
	Central Coast	239	2000-03	37

Lifecycle Segment

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Lifecycle Segment	Young single living at home	310	2001-03	37
	Young/midlife couple, no kids	246	2001-03	41
	Parent with youngest child aged 5 or less	370	2001-03	34
	Parent with youngest child aged 6-14	383	2001-03	34
	Parent with youngest child aged 15+ still living at home	220	2000-03	38
	Older non-working single	190	2000-03	40
	Older working married person	280	2001-03	39
	Older non-working married person	482	2002-03	36

Travel Party Profile

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Travel Party Type	Traveling alone	315	2001-03	37
	Adult couple (in a relationship sense)	834	2003	39
	Family group - parents and children	801	2002-03	29
	Friends or relatives traveling together - with children	154	1999-03	40
	Friends or relatives traveling together - without children	379	2002-03	40

Number in Party & Gender

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Number in Travel Party	1 person	315	2001-03	37
	2 people	994	2003	36
	3 - 5 people	940	2003	37
	6 - 10 people	199	2000-03	40
Gender	Male	1,390	2003	31
	Female	1,102	2003	34

Age Groups

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Age Group	15 - 19 years	247	2000-03	36
	30 - 34 years	225	2000-03	38
	35 - 39 years	219	2000-03	38
	40 - 44 years	277	2001-03	39
	45 - 49 years	244	2000-03	36
	50 - 54 years	271	2001-03	39
	55 - 59 years	238	2000-03	37
	65 - 69 years	216	2000-03	38
	70 years or over	261	2001-03	40
	Only 4 age groups in 1998-99	451	1999-03	25

Household Income

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Annual Household Income	\$8,300 - \$15,599 pa	129	1998-03	40
	\$26,000 - \$36,399 pa	161	1999-03	39
	\$36,400 - \$51,999 pa	294	2001-03	38
	\$52,000 - \$77,999 pa	604	2002-03	33
	\$78,000 - \$103,999 pa	375	2001-03	34
	\$130,000 pa or more (1998-2003)	172	1999-03	38
	Refused	279	2001-03	39
	Don't know	393	2002-03	40

Marital Status & Trip Destination Purpose

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Marital Status	Single (never married, divorced, separated, widowed and not part of a couple)	771	2002-03	30
	Part of a couple (married, defacto, living together)	1,723	2003	28
All Trip Destination Purpose of Visit- Detailed Breakdowns	Visiting relatives (including family weddings etc)	431	2002-03	38
	Holidays, leisure, relaxation or getting away	1,823	2003	28
	Leisure, relaxation or getting away (1998-99)	183	1998-03	34

Breakdown of Activities

All Trip Destination Activity - Detailed Breakdowns

Go to the beach (including swimming)	1,625	2003	29
Visit national parks or State parks	209	1999-03	35
Go whale or dolphin watching (on ocean)	200	2000-03	39
Bushwalking or rainforest walks (2000 on)	340	2001-03	35
Go fishing	529	2002-03	35
Play golf	154	1999-03	40
Play other sports	224	2000-03	38
Other outdoor activities (eg horse riding, rock climbing, 4WDing etc)	374	2002-03	41
Go on guided tours or excursions	163	1998-03	36
Charter boat, cruise or ferry ride	196	1999-03	36
Going to markets (street, weekend or art craft)	203	2000-03	39
Visit friends and relatives	580	2002-03	34
Eat out at restaurants	1,324	2003	32
Movies or videos	282	2001-03	39
Pubs clubs discos etc	692	2002-03	31
Go shopping (pleasure)	804	2002-03	29
General sight seeing	964	2003	36
Go on a daytrip to another place	287	2001-03	38
Picnics or BBQs	283	2001-03	38

Accommodation Used

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
All Trip Destination Accommodation Used - Grouped Accommodation Types	Hotel, resort, motel or motor Inn	547	2002-03	34
	Rented house, apartment, flat or unit	581	2002-03	34
	Caravan park or commercial camping ground	358	2001-03	35
	Friends or relatives property	692	2002-03	31
	Own property (e.g. holiday house)	389	2002-03	40

Month Returned From Trip

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Month Returned From Trip	January	652	2002-03	32
	February	191	1999-03	37
	March	137	1998-03	39
	April	253	2001-03	40
	August	238	2000-03	37
	September	168	1999-03	39
	October	244	2001-03	41
	November	177	1999-03	38
	December	276	2000-03	34

Origin, Transport & Single/Multiple Destination

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Interstate or Intrastate Visit	Interstate	437	2002-03	38
	Intrastate	2,175	2003	26
All Destination Transport Used - Grouped Transport Types	Private or company vehicle	2,269	2003	25
	Other transport	140	1998-03	39
Single or Multiple Destination Trip	Stayed all nights in one destination	2,139	2003	26
	Did not stayed all nights in one destination	365	2001-03	34

Package/Non Package & Weekend/Weekday Return

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Package or Not Package	No	204	2000-03	39
	Not applicable	2,280	2003	25
Returned on Weekend or Weekday	Returned from trip on weekend	1,059	2003	35
	Returned from trip on weekday	1,433	2003	31

Purpose of Visit

		Latest Viable Annual Average Nights estimate (000)	Relates to the Years(s)	% error (+/-)
Main Destination Purpose of Visit- Detailed Breakdowns	Visiting relatives (including family weddings etc)	437	2002-03	38
	Holidays, leisure, relaxation or getting away	1,850	2003	27
	Leisure, relaxation or getting away (1998-99)	183	1998-03	34




ADDITIONAL REPORTS

- Similar report on visitors
- Similar report on day trippers
- All three of these actual reports are a good deal more comprehensive than has just been demonstrated

Expenditure Estimate Breakdown

Expenditure Item	Total Estimate 1998 - 2004	Error (+/-%) if applicable	Average Annual Estimate
Fuel	\$177,426,000	31	\$25,346,571
Accommodation (can include food)	\$560,406,000	20	\$80,058,000
Takeaways and restaurant meals	\$325,414,000	25	\$46,487,714
Groceries for self-catering	\$158,913,000	32	\$22,701,857
Alcohol, drinks (not already reported)	\$106,444,000	37	\$15,206,286
Shopping, gifts, souvenirs	\$148,198,000	33	21,171,143




Estimate of Economic Importance of Tourism in PORT STEPHENS (A) LGA

DOMESTIC OVERNIGHT VISITORS

**Estimated spend each year by domestic overnight
visitors: \$240 million**

Estimate of Jobs directly related to this spend: 1,822

Estimate of all Jobs related to this spend: 2,733




Estimate of Economic Importance of Tourism in PORT STEPHENS (A) LGA

DOMESTIC DAY VISITORS

**Estimated spend each year by domestic overnight
visitors: \$40 million**

Estimate of Jobs directly related to this spend: 306

Estimate of all Jobs related to this spend: 459



Estimate of Economic Importance of Tourism in PORT STEPHENS (A) LGA

DOMESTIC TOURISM - BOTTOM LINE

Estimated spend each year by domestic visitors: \$280 million

Estimate of Jobs directly related to this spend: 2,128

Estimate of all Jobs related to this spend: 3,192



CONFIDENCE IN RESEARCH

- CTA goal - maximum credibility
- CTA goal - maximum integrity
- National Visitors Survey
- CTA Local Area Research Working Group -
series of seminars
- Emergence of concept
- Discussions with Peter Valerio



CONFIDENCE IN RESEARCH

- Consolidating the concept
- Development of brief
- TRPs produced with the aid of seemingly endless consultation
- CTA member workshop
- Tourism Research Australia April workshop



CONFIDENCE IN RESEARCH

- Peer review
- CTA member user group
- Tourism Research Australia - Numerous discussions
- CTA Continuous Improvement Panel



WHERE TO FROM HERE...

- The primary partnership we are negotiating is of course with Tourism Australia & through them Tourism Research Australia
- Also working in close cooperation with the NSW Local Government and Shires Association and the Australian Local Government Association
- Strong commitment to continuous improvement

WHERE TO FROM HERE...

- Anticipating the future inclusion of the International Visitors Survey
- Can be combined:
 - Sub regional
 - Regional
 - Themed e.g. Highway
- TRPs - better marketing and better development decisions at the local area level



WHERE DO YOU GET IT?

- How to obtain TRPs for your own Local Area?
- When TRPs Mark II will be available?



THE FUTURE.....!

- CTA, together with its Members throughout NSW, is unashamedly proud of what we have created utilising Tourism Australia's marvelous NVS
- As industry associations go CTA is at the micro end of the scale
- But on behalf of our Members we have some expansive ambitions
- CTA looks forward to working closely with our Members, Tourism Australia, our industry colleagues and all levels of government right across Australia to maximise this breakthrough resource for the benefit of our industry