

Visitor Profile

Destination Port Stephens

Year-end June 2021

Financial Year Results



**DESTINATION
RESEARCH**
know your potential

Authored by: Jo Mackellar

October 2021

Key Performance Indicators

The data for this report is sourced from the National Visitor Survey produced by Tourism Research Australia, based on data for the 2020-21 financial year. According to TRA, across **all of Australia**, the number of domestic overnight trips in regional areas decreased 12% in the year-end June 2021.¹ The results for Port Stephens, however, show a 20% increase on the previous year for domestic overnight visitors, and a 2% increase on all visitors. As shown on page 3 this result was supported by a strong performing final quarter in Apr- June 2021.

Year end June '000	2017	2018	2019	2020	2021	5 year average
Domestic overnight visitors	677	741	810	713	858	760
% change	9%	9%	9%	-11%	20%	
Domestic nights	2,174	2,217	2,512	2,217	2,514	2,327
% change	4%	2%	13%	-12%	15%	
av night stay	3.2	3.0	3.1	3.1	3.0	3
Domestic day visitors	633	818	917	952	860	836
% change	-17%	29%	12%	4%	-10%	
International overnight visitors	37	49	43	26	0	31
% change	42%	32%	-12%	-40%	-100%	
International Nights	171	160	175	166	0	134
Year end June Total Visitors	1,347	1,608	1,770	1,691	1,718	1,627
% change	-4%	19%	10%	-6%	2%	
Year end June Total Nights	2,345	2,377	2,687	2,383	2,514	2,461
% change	8%	1%	13%	-11%	5%	

Source: National Visitor Survey & International Visitor Survey, Tourism Research Australia

Visitor Expenditure

In year ending June 2021, total visitor expenditure to Port Stephens was \$705 million, an increase of 24% on the previous year.

¹ <https://www.tra.gov.au/data-and-research/reports/copy-of-national-visitor-survey-results-march-2021/national-visitor-survey-results-june-2021>

Domestic Source Markets

Domestic source markets remain in a similar pattern to previous years, with day visitors from the Hunter providing the majority of day visitors, while Sydney is still the main overnight visitor market.

When 2020/21 is compared to the five year average, there was a slight variation in the overnight market with an increase in visitors coming from Sydney (+11%) than in the previous five years, and less from the Hunter and other areas of NSW. The day visitor market showed no significant change in source markets.

Domestic Source Markets (Year end June 2021)

State	Region	Overnight 2021	Overnight 5 year av	Day 2021	Day 5 year
NSW		93%	89%	100%	100%
	Sydney	70%	59%	15%	16%
	Hunter	9%	12%	72%	70%
	Central Coast	5%	6%	4%	6%
	North Coast	2%	4%	7%	5%
	Other NSW	7%	8%	1%	3%
QLD		3%	4%		
	Brisbane	3%	2%		
	Gold Coast	1%	2%		
	Sunshine Coast	<1%	<1%		
	Other QLD	0%	0%		
VIC		2%	4%		
	Melbourne	1%	4%		
	Other VIC	0%	0%		
Other States		2%	3%		
	SA (ADL)	1%	1%		
	ACT (CBR)	1%	2%		
	TAS (Hobart)	<1%	<1%		
	WA (Perth)	<1%	<1%		
	NT	<1%	<1%		

Source: National Visitor Survey, Tourism Research Australia

Domestic Overnight Visitors

Travel Party

The travel party of domestic overnight visitors has not changed significantly over the past 5 years, with slight variations of 1-3% seen in some segments. Friends/relatives travelling in a group with or without children remain the largest segment at 32% , along with adult couples at 31%.

	2016	2017	2018	2019	2020	2021	average	2021 +/- average
Travelling alone	16%	10%	16%	10%	21%	15%	15%	
Adult couple	32%	33%	37%	30%	31%	31%	32%	-2%
Family group - parents and children	26%	24%	18%	26%	20%	22%	23%	-1%
Friend or relative group	25%	30%	27%	32%	25%	32%	28%	3%

Reason to travel to the destination

There has been a shift from VFR to holiday visitors, with 7% more holiday visitors in 2021 than the 5 year average, and correspondingly a 6% decrease in VFR travellers. As shown, the VFR market was lower than the previous 4 years.

	2017	2018	2019	2020	2021	5 year average	2021 +/- over average
Holiday	65%	66%	66%	54%	73%	66%	7%
VFR	27%	27%	29%	33%	20%	26%	-6%
Business	3%	6%	2%	10%	6%	5%	1%
Other	2%	1%	1%	2%	1%	2%	0%
In transit	3%	0%	2%	2%	0%	1%	-1%

Age and gender

The age of domestic overnight visitors has not changed significantly over the past 5 years, with only slight variations of 1-3% seen in some age segments.

There was also no change to the gender split of visitors at a steady 50% male and 50% female.

	2017	2018	2019	2020	2021	average	2021 +/- over average
15-19	8%	3%	3%	6%	2%	5%	-2%
20-24	5%	3%	7%	8%	6%	6%	
25-29	8%	9%	5%	9%	11%	8%	3%
30-34	7%	10%	14%	9%	7%	10%	-3%
35-39	8%	6%	11%	10%	8%	9%	
40-44	6%	13%	6%	7%	12%	9%	3%
45-49	10%	7%	7%	11%	8%	8%	
50-54	8%	9%	10%	8%	9%	9%	
55-59	8%	9%	7%	7%	9%	8%	1%
60-64	6%	9%	6%	9%	6%	7%	-1%
65-69	11%	9%	13%	7%	11%	10%	1%
70-74	7%	6%	6%	4%	7%	6%	1%
75-79	5%	5%	3%	3%	3%	4%	-1%
80+	1%	2%	1%	2%	1%	1%	
total	100%	100%	100%	100%	100%	100%	

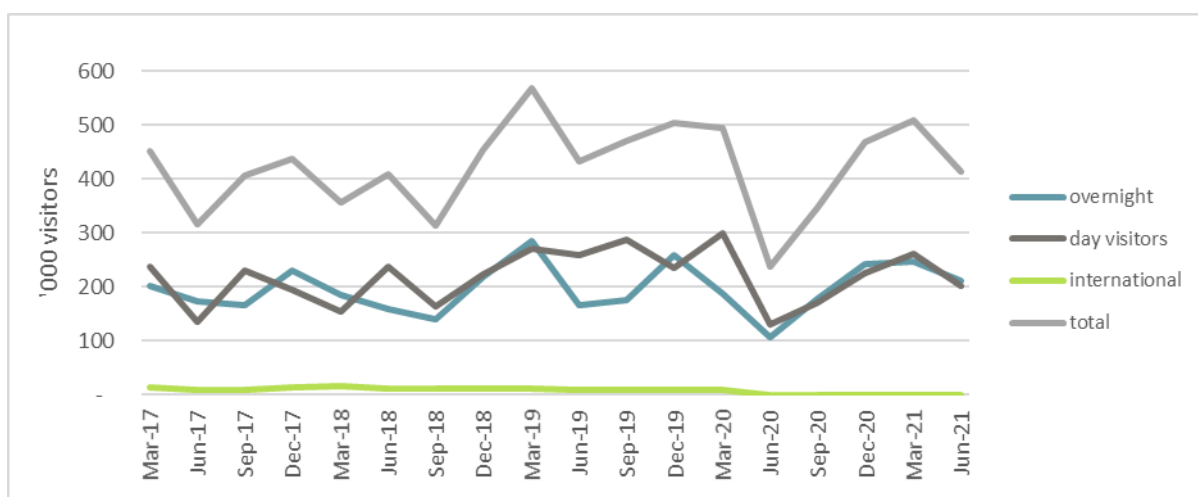
Quarterly analysis

When comparing the quarterly analysis on the previous year, the impacts of Covid-19 travel restrictions on both overnight and day visitors can be observed. In the June 2020 quarter regional travel restrictions in NSW were in place, while in 2021 there were less restrictions, resulting in strong gains of 99% in the June quarter from 2020.

	July-Sept Quarter			Oct-Dec Quarter			Jan-March Quarter			April-June Quarter		
	2019	2020	% Change	2019	2020	% Change	2020	2021	% Change	2020	2021	% Change
Domestic Overnight	175	177	1%	260	241	-7%	187	230	32%	106	210	99%
Domestic Nights	400	473	19%	861	695	-13%	720	800	11%	588	593	2%
Day Trips	288	170	-41%	234	226	-3%	299	261	-13%	131	203	55%

Year to date analysis

Analysis of the past five years shows positive signs of recovery in March 2021 from the low ebb of the June quarter in 2020. However, further lockdowns in Sydney in July to September 2021 may affect future quarters, with another decrease expected.



	Sept quarter 2020	December quarter 2020	March quarter 2021	June quarter 2021	year end June 2021
Domestic overnight visitors '000	177	241	230	210	858
% increase		37%	2%	-15%	8%
nights	473	695	800	593	2514
% increase		47%	15%	-25%	13%
av night stay	2.7	3.0	3.2	2.9	3.0
Domestic day visitors '000	170	226	261	203	860
% increase		33%	15%	-22%	9%
total visitors	347	467	491	413	1718
total nights '000	473	695	800	593	2514
% yearly visitors	19%	27%	31%	24%	100%

TRA data for the SA2 area of Port Stephens includes the seven sub-regions of Anna Bay, Lemon Tree Passage - Tanilba Bay, Nelson Bay Peninsula, Raymond Terrace, Seaham – Woodville, Williamtown - Medowie – Karuah, Stockton - Fullerton Cove.

Disclaimer and Copyright

This report has been compiled by researchers from Destination Research. The visitation statistics contained in this report are based on the sample data collected by TRA and therefore provide an indication of visitor trends rather than actual performance measures. The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required in some areas to validate the findings of this study. Enquiries should be directed to the Research Manager, destination.research@yahoo.com